

EXHIBIT B

Talia N. Harrison - 1/19/2022

1	IN THE UNITED STATES DISTRICT COURT		
2	FOR THE EASTERN DISTRICT OF TEXAS		
	SHERMAN DIVISION		
3	TALIA N. HARRISON,	*	
		*	
4	Plaintiff,	*	
		*	
5	vs.	*	No. 4:21-cv-00607-ALM
		*	
6	TYLER TECHNOLOGIES, INC.,	*	
		*	
7	Defendant.	*	

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A P P E A R A N C E S
(Appearing remotely)

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1 it, yes.

09:43 2 Q. Okay. Okay. Great. And is this the offer
3 letter you received for ExecuTime back in August of
4 2013?

09:44 5 A. Yes, that is correct.

09:44 6 Q. And ExecuTime was acquired by Tyler in June of
7 2016, correct?

09:44 8 A. That is correct.

09:44 9 Q. So in this offer letter, you were offered the
10 position of project manager, slash, trainer; is that
11 right?

09:44 12 A. Yes.

09:44 13 Q. And your annual salary was 48,000?

09:44 14 A. Yes.

09:44 15 Q. And the letter informed you that your position
16 was exempt from overtime under the FLSA, or the Fair
17 Labor Standards Act?

09:44 18 A. Yes.

09:44 19 Q. So when you received this offer letter, you
20 understood that you would not be receiving any
21 additional pay for hours worked over 40 hours per week?

09:45 22 A. Yes.

09:45 23 Q. So what is the ExecuTime software?

09:45 24 A. It's a timekeeping software used throughout
25 different municipalities for tracking of, you know,

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1 regular hours, overtime, shift differential pay, things
2 of that nature. The time is calculated in ExecuTime,
3 and then it's exported into various payroll vendors,
4 whatever the client uses, to actually do the
5 calculations and create the paychecks and direct
6 deposits, things of that nature.

09:45 7 Q. And after the Tyler acquisition of ExecuTime in
8 2016, you remained involved with ExecuTime software?

09:45 9 A. Yes.

09:46 10 Q. You continued to serve in that project manager
11 role?

09:46 12 A. Yes.

09:46 13 Q. And at some point did you become a senior
14 project manager?

09:46 15 A. Yes.

09:46 16 Q. When did that happen?

09:46 17 A. I want to say that was around -- it was shortly
18 after I started, I don't even think a year. I want to
19 say November of -- oh, gosh. Give me one second. I'm
20 sorry. No, the senior project manager title happened
21 after the acquisition. That's what it was. So it would
22 have been June, July of 2016. That is the title Tyler
23 gave me.

09:46 24 Q. Did your compensation change?

09:46 25 A. Not with the title change, that I can recall.

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09:47 1 Q. Did you receive annual salary increases?

09:47 2 A. I did.

09:47 3 Q. Were those for a fixed amount, or did it vary
4 year by year?

09:47 5 A. It would vary year by year, but, you know, they
6 were pretty consistent with giving me anywhere between 3
7 and 3.5 percent.

09:47 8 Q. When you worked as a senior project manager,
9 did you work remotely, from home?

09:47 10 A. It -- I had the option to work from home some
11 days, usually Fridays. But for the most part, I was --
12 during that specific time frame, I was going to the
13 office Monday through Thursday, usually working from
14 home on Fridays.

09:48 15 Q. When you say "that" time frame, what time frame
16 are you referring to?

09:48 17 A. The time frame that we're asking, for wages.

09:48 18 Q. So at any point that you were in the senior
19 project manager role, did you transition from working
20 primarily in the office to working primarily from home?

09:48 21 A. Yes.

09:48 22 Q. When did that occur?

09:48 23 A. That would have been -- I want to say February
24 of 2019 through the remainder of my tenure.

09:48 25 Q. And you were in that senior project manager

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1) role until around November of 20 --

09:49 2 A. '19.

09:49 3 Q. '19?

09:49 4 A. Yes, ma'am.

09:49 5 Q. And what was your compensation at the time you
6 left the senior project manager role in November of
7 2019?

09:49 8 A. Around sixty-four four. 64,400.

09:49 9 Q. And you said in February 2019 you began working
10 from home primarily. What was the reason for that
11 change?

09:49 12 A. I moved out of state, and so there wasn't, you
13 know, an office. It was more than an hour away from the
14 office.

09:49 15 Q. So at that point you wouldn't come into the
16 office really regularly? It would just be anytime you
17 were in town, or when would you come into the office?

09:50 18 A. Correct, if I was in town, and only if, you
19 know, while I was in town I wanted to work from the
20 office. A lot of times I would work from my daughter's
21 house. But it was flexible.

09:50 22 Q. So you didn't have to come to the office when
23 you were in town? It's only if you wanted to?

09:50 24 A. That's correct.

09:50 25 Q. How often would you say you went into the

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1 office during that time period?

09:50 2 A. Maybe two or three times.

09:50 3 Q. Two or three times from February 2019 until
4 around November 2019?

09:50 5 A. Correct.

09:51 6 Q. And when you were a senior project manager, did
7 your duties evolve, or did they stay pretty consistent
8 throughout that time period?

09:51 9 A. They -- I would say they stayed pretty
10 consistent.

09:51 11 Q. I want to talk a little bit about your job
12 duties as a senior project manager, and I think it would
13 be helpful to kind of start generally.

09:51 14 So as a senior project manager, you helped
15 oversee implementations of the ExecuTime software,
16 correct?

09:51 17 A. That is correct.

09:51 18 MR. HERRINGTON: I'm sorry. I need to --

09:51 19 Q. Can you --

09:51 20 MR. HERRINGTON: Excuse me. I need to
21 make a small objection for vagueness. Are we talking
22 only about after the promotion?

09:52 23 MS. BROWN: When she was promoted in June
24 or July of 2016.

09:52 25 MR. HERRINGTON: Oh, that was -- I'm

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1 sorry. I mixed up dates. I have that as a later date.
2 Then I guess we are talking about senior only. Okay.
3 Sorry.

09:52 4 MS. BROWN: No problem.

09:52 5 Q. So going back, Ms. Harrison, so can you kind of
6 explain, I guess, kind of the life cycle or the phases
7 that a senior project manager would be involved with
8 with an implementation of ExecuTime software?

09:52 9 A. Sure. So, you know, once the -- the project is
10 assigned to the project manager implementation
11 consultant team, the PM -- is it okay to refer to
12 project manager as "PM"?

09:52 13 Q. Sure.

09:52 14 A. Okay. So the PM would be responsible for
15 hosting a stakeholder's kickoff call with the client.
16 Prior to that call, the project manager will have
17 reviewed a questionnaire that typically is provided by
18 sales initially. And during the transition over to the
19 project manager, it's completed.

09:53 20 So we would review the questionnaire. We
21 would, you know, read the contract, understand the
22 number of powers or the type of contract it was. We
23 would map out an implementation timeline for the IC that
24 we're assigning that project to, you know, based on
25 their current availability. And so we're basically

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1 prepping for the stakeholder call so that we could
2 review all of this documentation on that call.

09:53 3 Once we have the stakeholder presentation,
4 it would be up to the project manager to stay in
5 communication with the client, to give them an
6 opportunity to review the timeline, you know, make sure
7 that that lines up with their current schedules and
8 priorities. And then ultimately we're requesting
9 sign-off on that timeline before we start to engage the
10 implementation consultant.

09:54 11 While we're waiting on that signature,
12 there were templates that were preconfigured based on
13 the type of implementation and the way the client was
14 hosted. So if they were on premise or if they were a
15 SAS client or an ASW- -- or AWS cloud, there was
16 different templates that you would choose from in Jira,
17 which was a ticketing system.

09:54 18 And so you would go in and clone whatever
19 template best fit that project. And there were about 32
20 tasks that the PM and the IC would have to go through
21 through the life cycle of the implementation.

09:54 22 And so since it's a template that we were
23 cloning, we would have to go in and rename the initial
24 template to whatever the client's name is, and then we
25 would have to go in and manually touch each task and

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1) rename it so that it doesn't read "template," but, in
2) fact, it reads, you know, whatever the client's name is
3) and whatever that task to be completed was.

09:55 4) Throughout the life cycle of the
5) implementation, we had to keep those tickets up to date
6) with the number of hours or even minutes spent on
7) working that particular task. We had to copy our email
8) conversations regarding that task into the ticketing --
9) into that task ticket in order that the conversation
10) happened so that it would be easy to read.

09:55 11) We would have to -- every time, of course,
12) we spent time on that particular task, we would have to
13) update that task with the amount of time spent and
14) basically just keep notes there so that if anyone came
15) in and needed to step in for us, they could very easily,
16) you know, reference where the project left off.

09:55 17) So once we -- we have that signed,
18) implementation timeline, at that point we would host a
19) kickoff call to introduce the IC to the client.

09:56 20) And, I'm sorry, I need to back up just a
21) second. So from the questionnaire, the project manager
22) was also responsible for taking that questionnaire and
23) producing what we called a scope of work or a -- yeah,
24) pretty much a scope of work. And it basically -- or
25) solution design is another term for it. But we

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1 basically would outline based on what they answered in
2 that questionnaire what we would be implementing, you
3 know, what our pilot users would be, how things would be
4 phased out.

09:56 5 You're pretty much putting together a
6 synopsis of what you're going to deliver to the client.
7 And that's also something that would have to be signed
8 off on with the timeline.

09:56 9 So once you have all those documents and
10 you start to -- you introduce your IC, the PM would then
11 be responsible for just managing the project.
12 Anything -- the budget. Anything that came up during
13 the implementation as, like, an escalation, we would --
14 the project manager would be the one to communicate that
15 with the manager of implementation to come up with an
16 action plan for moving forward. So I guess you would
17 call that, like, issue resolution or escalations.

09:57 18 Q. Now, what about after the implementation
19 progressed? If there's a go-live period, what's the
20 project manager's responsibility during that period?

09:57 21 A. Sure. So it's actually really the IC's
22 responsibility to keep up with that go-live. For the
23 most part, the project manager is just communicating and
24 making sure that we stay on track for that date. You
25 know, if the IC runs into any complications where they

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1 feel like, for whatever reason, they're not going to
2 meet the date that we set, we would work directly with
3 the ICs on -- on a solution to that. A lot of times
4 management would be involved in that as well.

09:58 5 Also, as a project manager, you know, we
6 were responsible for, you know, allowing new hires to
7 shadow us to get experience and help with projects that
8 we're currently working on. We were training new hires.

09:58 9 Q. And this would be new-hired PMs?

09:58 10 A. Or ICs. During that -- my tenure, during that
11 time, it was just myself and one other lady that had the
12 most seniority. And so during that time period, we had
13 five or six new implementation consultants. So we all
14 kind of had to, you know, pitch in and assist with
15 getting them up to speed so that we could come off the
16 road, because we were also -- myself and Jessie Bell,
17 another project manager there, we were doing a lot of
18 the IC work as well just because there was so much
19 turnover.

09:59 20 And we constantly, you know, had so many
21 new people at one time, we were having to travel and do
22 on-site trainings and, you know, remote trainings and
23 things like that that the ICs typically would do under
24 the Tyler umbrella.

09:59 25 Q. And so was there a difference in duties between

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1 a project manager and a senior project manager?

09:59 2 A. There was not. I think that's just a title
3 they gave me because I had been there for so long. I
4 didn't -- I mean, I don't think it was a promotion, but
5 maybe so. I didn't even know that my title had changed.
6 I had to ask about it.

09:59 7 Q. I think you referenced that there was one other
8 project manager there at that time. Is that right?

09:59 9 A. There were a couple of other project managers
10 at that time, but myself and Jessie Bell had the most
11 seniority at that time. We had both been there five,
12 six years; whereas, everyone else were within, you know,
13 anywhere from six months to maybe a year, year and a
14 half.

10:00 15 Q. Was Jessie Bell also a senior project manager?

10:00 16 A. She was, uh-huh.

10:00 17 Q. How many project managers total were there at
18 one time?

10:00 19 A. During that time frame, there was -- I'm going
20 to say four; however, one of them was actually the
21 manager of implementation, but she was working as a
22 project manager as well because we were so -- you know,
23 so short-staffed.

10:00 24 Q. And the manager of implementation, would that
25 have been your supervisor?

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1 one screen and the solution design on another. We would
2 have had calls and things like that to go through the
3 questionnaire as well. I think I left that off. Again,
4 you know, I haven't worked in that position for a couple
5 of years now, so I'm a little dusty, but ...

10:06 6 So we'd basically have the two documents
7 on two monitors. And based on what we have from the
8 questionnaire and what we obtained from the solution
9 design call, we would go -- you know, pretty much just
10 go in and type into the template the -- whatever lined
11 up with the questions -- line the questions up with the
12 template for the solution design. In some cases, you
13 can copy and paste, but a lot of it was manual entry,
14 like, data entry.

10:07 15 Q. And then was there information in the solution
16 design that you would remove if not applicable to the
17 client based on their answers to the questionnaire?

10:07 18 A. Yes.

10:07 19 Q. And you said you had calls to go through the
20 questionnaire?

10:07 21 A. We did.

10:07 22 Q. Would these be calls between yourself and the
23 client?

10:07 24 A. Yes. We would have a call with ourself and the
25 client to go through their questionnaire and get more

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1 in-depth answers to the questions that they answered or,
2 you know, validate any information that we didn't
3 understand from the questionnaire that they filled out.
4 There would be a call to go through that. There would
5 also be a --

10:07 6 Q. And who would be on that call?

10:07 7 A. Sure. That would be myself and the client.

10:08 8 Q. So in advance of that call, you would have
9 reviewed the questionnaire to see if there was anything
10 on there from the client that you didn't understand that
11 you needed to discuss on the call to the client?

10:08 12 A. That is correct, yes.

10:08 13 Q. Okay. And then based on that analysis and that
14 phone call, you'd be able to complete the solution
15 design?

10:08 16 A. You got it.

10:08 17 Q. And then also creating the -- I think you
18 referred to it as an implementation timeline. How would
19 you go about creating that document?

10:08 20 A. I would pull up my implementation consultant's
21 calendar. Since I only worked with one, you know, I
22 pretty much know what her schedule would be and when she
23 would be available.

10:08 24 So I would just go through and pick dates.
25 The timeline was also a template, and so -- with

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10:10 1 Q. So in this timeline document that you would be
2 creating, were there phases that were just standard to
3 every implementation, or did the phases or training
4 differ based on each client's implementation?

10:10 5 A. The phases would be pretty standard, but what
6 the client would need in those particular phases is what
7 would -- would differ.

10:10 8 Q. So how would you know what the client would
9 need for a particular phase in order to complete the
10 timeline?

10:11 11 A. It would be based on, you know, things
12 discussed during the solution design call. Usually
13 it's -- usually in that way, because the phases were the
14 same. But what they need -- for instance, you know,
15 they may not use overtime or shift differential or
16 something like that.

10:11 17 So when we would actually get down to the
18 training, we would tailor that training specific to that
19 client. If they don't use overtime, well, we're not
20 going to show overtime. That type of thing.

10:11 21 Q. So you said based on the solution design call,
22 you would -- you would have that as an understanding of
23 what specific needs the client would have for the
24 different implementation phases.

10:11 25 Are these the solution design calls that

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1 you referenced earlier where you would go through the
2 questionnaire?

10:11 3 A. Yes.

10:11 4 Q. And so these were calls between yourself and
5 the client?

10:11 6 A. Yes.

10:12 7 Q. So you've mentioned training for clients as
8 well. Did you conduct training as a project manager?

10:12 9 A. I did, quite a bit.

10:12 10 Q. It sounded like there were different kinds of
11 trainings that each client might have as part of the
12 implementation. Is that right?

10:12 13 A. Yes. I mean, they typically all have the same
14 training. So they have, you know, a timekeeper
15 training. Those are going to be what we would refer to
16 as basic users or hourly employees. So everyone would
17 have a basic -- or -- yeah, basic user training.

10:12 18 Everyone would have a supervisor training,
19 where we would work directly with the supervisors. And
20 they would have to go through the basic user training as
21 well as supervisor training since they would be users
22 themselves but would also be, you know, supervising
23 subordinates.

10:13 24 And then everyone had an admin training.
25 Usually the admin training would just be with IT and

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1 shortly here. I just want to kind of wrap up this line
2 of questioning.

10:22 3 MR. HERRINGTON: Sure.

10:22 4 Q. So you said management would get involved if
5 you needed to move go-live dates or if there were client
6 complaints about an IC, or implementation consultant,
7 or, I guess, specific requests for you to do training by
8 the client.

10:22 9 Were there other areas where you would get
10 management involved during the implementation?

10:22 11 A. You know, pretty -- anytime that there was any
12 type of an escalation or a -- a decision needed to be
13 made that impacted the project, we would have to get
14 management involved.

10:22 15 I'm trying to think of any other specific
16 scenarios. I can't think of any other specific
17 scenarios. But, I mean, we would meet with management
18 regularly and give them an update on every single
19 project and where that project stood.

10:23 20 And so as the PM -- when I say "we," the
21 PM would meet with the -- with managers, and so -- and
22 they would meet with ICs as well. But we would go
23 through projects. And so at that time, if we're -- you
24 know, something came up, we would discuss resolutions or
25 how to approach, that type of thing. So management was

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1 involved pretty heavily.

10:23 2 Q. So you said you -- you involved them for
3 go-live dates, for client complaints regarding
4 implementation consultants, or client requests for you
5 to do training.

10:23 6 Other than those specific examples, can
7 you think of other times where you involved management?

10:23 8 A. If a contract was originally written for remote
9 training and the client later decided they want on-site.

10:24 10 Q. Any other examples you can think of?

10:24 11 A. Not that I can think of.

10:24 12 Q. And then you also said that sometimes you would
13 have to train a client multiple times or retrain them
14 based on an issue.

10:24 15 Who would make the decision that a client
16 needed to be retrained or trained again?

10:24 17 A. Management.

10:24 18 Q. And would you tell them, I guess, during one of
19 your check-in calls that it was your, you know, opinion
20 that this client needed to be retrained or trained
21 again?

10:25 22 A. I wouldn't make any recommendations either way.
23 I would pretty much just discuss the complaint, and
24 management would make a decision, because I wasn't
25 allowed to make -- usually if there was an issue with a

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10:26 1 Q. And who would be on those weekly calls?

10:26 2 A. Usually just project management and the
3 client -- or project manager, rather, and the client.

10:26 4 Q. And then if clients did need to be retrained or
5 trained multiple times, that would require you to go
6 back and adjust the implementation timeline?

10:27 7 A. Not -- not all the time, because usually I -- I
8 would build buffer room around the training session to
9 give, you know, the clients the opportunity to go back
10 and -- we recorded our trainings and provide -- every
11 training was recorded and provided to the client.

10:27 12 And so, you know, we would want to build
13 buffer room into the timeline to make sure that they
14 have an opportunity to go in and watch the recording and
15 get in the system and play around with it. So not every
16 time, no.

10:27 17 Q. And then how would you account for buffer time
18 when you were building out an implementation timeline?

10:27 19 A. Usually it -- you know, it helped because our
20 ICs were always booked back to back. So a lot of times
21 we couldn't help but put the buffer time in.

10:27 22 But usually it was based on blackout dates
23 provided by the client. It would -- we would, you know,
24 look at what else the IC has scheduled, and then we --
25 the timeline that we were using, like I said, had

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1 courthouse, in a -- just in an empty space. And usually
2 there -- it would be a classroom-type setting. A lot of
3 cases, they would have computers set up so that as
4 you're going through the training, you can pause and let
5 users log in and do things as well.

10:42 6 And we would, you know, be standing in
7 front of the class, and we would have a TV or a
8 projector, or what have you, connected to our laptop,
9 and we would conduct the training in their training
10 environment. In some cases, we would be at city hall,
11 and the trainings would be recorded by someone, by the
12 client's staff, so -- but it was always in a
13 classroom-type setting and within their actual system.

10:42 14 Q. You said you would configure the training
15 before you went to the client's site; is that right?

10:42 16 A. Yes, that is correct.

10:42 17 Q. Explain to me what configuring it would entail.

10:43 18 A. Sure. So there's -- in ExecuTime there were a
19 few imports that would take place. So we would import
20 employee demographics, phone numbers, addresses, you
21 know, employee status, that type of thing. But then if
22 they were using -- if they were using, let's say,
23 overtime or shift differential, we would actually have
24 to go in and configure that.

10:43 25 If they weren't going to have users

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1 clocking in and out, we would have to go build security
2 walls to say, you know, okay, this particular employee's
3 going to clock in and out versus these employees are
4 going to do manual time sheet entry.

10:43 5 And usually you would -- you would
6 configure both types of scenarios, so that if it's one
7 of the initial trainings, where a client doesn't know
8 exactly which option they're going to choose, you can
9 show both, you know, to give the client a better idea of
10 what their options are. And then, you know, they can
11 make a decision from there.

10:43 12 So we would have to build, you know,
13 security permissions. We would have to go in and build
14 overtime rules and shift differential rules. We would
15 go in and prepopulate time cards so that when we're
16 going through the training, we're not actually clocking
17 in and out or doing time entry. We're basic- -- we'll
18 show how that functionality works, but then we can go
19 and show them how the time card would look based on the
20 time entry type that's -- that's chosen.

10:44 21 Q. So it sounds like some of the configuration
22 that you needed to do you might learn during an initial
23 training with the client, but would other, I guess,
24 instances of configuration that needed to occur,
25 would -- how else would you figure that out if it wasn't

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1 through an initial training?

10:44 2 A. Yeah, so during training, usually the client
3 can identify, Oh, well, we forgot about this.

10:44 4 It's almost impossible to capture
5 everything in the solution design. And then also once
6 they have a better understanding of how ExecuTime can be
7 configured, and they realize that not every department
8 has to do things the same way, a lot of times we would
9 leave those trainings and have to go back and make
10 adjustments based on the client's new understanding of
11 what their options are.

10:44 12 Q. So some of it would come through the solution
13 design; some of it would come through training as it
14 evolved?

10:45 15 A. Yes.

10:45 16 Q. And what would that look like? The client
17 coming to you and saying, You know, after seeing this
18 feature, we want -- we want to change it this way, and
19 then you would go and configure the setup?

10:45 20 A. A lot -- yes.

10:45 21 Q. And then I guess for the customization, you
22 would know through the solution design? That's
23 something that you would just, I guess, learn from going
24 through and reviewing the solution design that you
25 created from their questionnaire?

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1 request it, and then management would come, come to me.

2 (Exhibit 2 marked.)

10:54 3 Q. Okay. I've shared what will be Exhibit 2 with
4 you. Do you see that in front of you, Ms. Harrison?

10:54 5 A. Yes, I do.

10:54 6 Q. And do you recognize Exhibit 2?

10:54 7 A. I do.

10:54 8 Q. And is this a résumé that you had prepared?

10:54 9 A. Yes.

10:54 10 Q. And it looks like you prepared this while you
11 were still working at Tyler in the senior project
12 manager role. Is that right?

10:55 13 A. Yes.

10:55 14 Q. I wanted to ask you about some of the bullet
15 points that you had included in this résumé.

10:55 16 Do you see about halfway down, on the
17 first set of bullet points under senior project manager,
18 there's one that starts with "Manages, monitor, and
19 motivates"?

10:55 20 A. Yes. Yes, I do.

10:55 21 Q. Okay. And it says, "Manages, monitor and
22 motivates the cross functional team assigned to each
23 project."

10:55 24 Who would -- who would be the
25 cross-functional team that you're referencing there?

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10:55 1 A. Sure. So it would be the implementation
2 consultant that I'm working with; it would be the team
3 responsible for deploying the software to the servers;
4 it would be any technical contacts that are -- that are
5 helping with establishing the email configuration within
6 ExecuTime so that the email server talks to ExecuTime,
7 sends notifications.

10:56 8 The technical team would also assist with
9 time clock setup that needed to be done on a server so
10 that my IC could actually train on the time clock. The
11 technical team would also assist with any type of
12 technical calls that we had to discuss server
13 specifications required for the installation of
14 ExecuTime, those type of things. So it's typically
15 Tyler, Tyler teams.

10:56 16 Q. Okay. And that would consist of the
17 implementation consultant, the deployment team, and the
18 technical contacts?

10:56 19 A. Correct. And I would include management in
20 that as well because, you know, sometimes we would have
21 to get them involved if, you know, an installation
22 couldn't happen sooner, you know, as soon as we needed.
23 We would have to go to management for management to go
24 to the manager of, you know, those teams to kind of get
25 things pushed through.

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10:57 1 Q. And so when you said you managed the
2 cross-functional team, how would you be managing those
3 different groups?

10:57 4 A. We're still managing the communication between
5 all groups so that we're all on one accord and can set,
6 you know, appropriate expectations.

10:57 7 Q. And that would be all, I guess, with the
8 purpose of getting this implementation done, you know,
9 on schedule, within scope?

10:57 10 A. That is correct.

10:57 11 Q. What about "monitor and motivates"? How would
12 you do that?

10:57 13 A. So there were some times where we would have to
14 put tickets in to have things done. And so I would
15 monitor the ticketing system to make sure that --
16 because when you initially enter a ticket, it's in
17 just -- in a pool with other tickets that have to be
18 assigned or pulled from that queue. Excuse me.

10:58 19 And so I would just monitor to make sure
20 that that's happening in a timely manner and it's been
21 assigned to a representative, so that once it's assigned
22 to a representative, I know who I can go in and touch
23 base with as to when it will be completed.

10:58 24 Q. And then what about the "motivates"?

10:58 25 A. That would just come from, Hey, team, you know,

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1 can -- it would be great if you can kind of get this
2 done by this date; the client has expectations of
3 such-and-such from sales. You know, just trying to, you
4 know, just promote a healthy working team morale.

10:58 5 Q. And you were often, I guess, out of that team,
6 the one that had the direct client contact, so you were
7 aware of what the client's expectations were as far as
8 progressing and the schedule?

10:58 9 A. Exactly.

10:58 10 Q. And then a couple of bullet points down -- it
11 looks like -- one, two, three -- the third bullet point
12 down from that one, there's a bullet point that says,
13 "Creates and delivers customized ExecuTime client
14 training sessions via the web and/or on-site visits to
15 ensure client satisfaction and product knowledge."

10:59 16 Do you see that?

10:59 17 A. I do, yes.

10:59 18 Q. How were the ExecuTime clients' training
19 sessions customized?

10:59 20 A. Sure. So just kind of going back to what I
21 mentioned earlier, it's just, you know, we have a list
22 of -- a template list of what's covered under each
23 training session, and then you're basically just
24 omitting whatever doesn't apply to the client.

10:59 25 Q. And you would -- I think we talked about

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1 mean, I -- I maintained anywhere from 19 implementa- --
2 19 to 23 implementations at a time. It may or may not
3 impact the existing clients or the current clients that
4 I was working on. It was more so just knowledge share.

11:06 5 You know, we wanted to always have
6 knowledge sharing going on amongst the team and making
7 sure that everybody knows what's available, what's new
8 and -- you know, new to the software, so that as they're
9 training clients, they can incorporate that into their
10 training sessions.

11:07 11 Q. And in the next bullet point down, you said,
12 "Continuously consults with Stakeholders regarding their
13 specific company operations in order to recommend best
14 utilization and customization of ExecuTime
15 configuration."

11:07 16 What recommendations would you be making
17 regarding utilization and customization of ExecuTime?

11:07 18 A. Sure. So as we're configuring security roles,
19 so when you build a -- or security permission role in
20 ExecuTime, you typically want to, you know, try as best
21 you can to encompass security setup based on a group of
22 individuals, so that if you have 200 employees, you
23 don't want to have to create 200 security roles to
24 accommodate how they're going to use ExecuTime.

11:08 25 You would -- the preference would be to

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1 create a security role, and that one security role would
2 be applicable to multiple users, so that once you create
3 that role, you can go into the user profile, assign that
4 security role, and, you know, that knocks out, you
5 know -- I don't know -- 30 of your users. And then you
6 may have to create another security profile that matches
7 how the next 30 or 25 users are going to use ExecuTime.

11:08 8 So it's basically making recommendations
9 on what ExecuTime could do for them so that they're
10 setting it up in a way that it won't become a
11 maintenance nightmare, so to speak.

11:08 12 Q. Gotcha.

11:08 13 Other than the security setup, are there
14 other examples of recommendations with respect to
15 utilization or customization of ExecuTime configuration
16 that you would make?

11:08 17 A. Uh-huh. There were other areas of the
18 application that held the same type of -- based on how
19 you set the system up in reference to the available
20 functionality is going to determine what it's going to
21 take to maintain the system going forward, as you have,
22 you know, people terminate or new hires come in or
23 rehires or whatever the case may be.

11:09 24 So a lot of the recommendations would be,
25 Okay, based on what I'm hearing, this group of employees

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1 handles things this way, whereas this group of employees
2 handles other scenarios a different way. So let's, you
3 know, build a configuration within ExecuTime, you know,
4 using our options available like this so that going
5 forward, as you're maintaining the new hires and what --
6 and so forth, you can, you know, easily group employees
7 together or classify employees. That was pretty much --
8 that's it.

11:09 9 Q. So you would be able to kind of come up with
10 these recommendations for how they build out or
11 configure ExecuTime based on, I guess, client calls and
12 just your communications with the client, understanding
13 their specific setup?

11:10 14 A. Correct. And -- right, and comparing that
15 what -- to what ExecuTime offers, what ExecuTime -- you
16 know, what ExecuTime can do.

11:10 17 Q. So on this next bullet point, it continues on
18 to the second page. It says, "Responsible for
19 completion of projects on time, on budget, on
20 specification. Performs a variety of tasks including,
21 but not limited to, scheduling all resources; setting
22 deadlines; assigning responsibilities; and monitoring,
23 summarizing and communicating the progress of the
24 project."

11:10 25 What -- what -- I guess, what would you be

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1 referring to when you said you were scheduling
2 resources?

11:10 3 A. So the implementation consultant and the
4 technical team. So, you know -- or -- and even
5 deployment. So once we have the timeline built, you
6 know, and we've got an idea of -- you know, a lot of our
7 clients came in ready to run with implementation. It
8 was, like, they had a timeline as to when this needed to
9 be done. They were going to be losing access to their
10 existing payroll system within a certain time frame.

11:11 11 And so that would just be me assigning
12 resources, make sure the deployment's done by this date,
13 you know, make sure the technical team has access to the
14 server there on prem, and I need them to go in there and
15 do any configuration before my IC can go in and set the
16 database up and prepare for training and things of that
17 nature.

11:12 18 Q. And so how specifically would that be
19 accomplished? Would you just be sending emails to these
20 different members of the implementation team and just
21 telling them, like, Hey, I need you to do "X" so we can
22 get "Y" rolling? Is that right, or --

11:12 23 A. Uh-huh. Some -- some -- some was via email.
24 And then, like, for deployment, we actually had Jira.
25 We would use Jira. And, again, it was a ticketing

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1 system. And so then we would put a ticket in, and we
2 would put specifics in that ticket as to when we would
3 need that task completed by.

11:12 4 And then usually they would communicate
5 back if they weren't going to, you know, be able to make
6 that date, or if they could pull it forward. You know,
7 they wanted to verify that was okay.

11:12 8 But, yeah, it would be primarily emails,
9 or we would use the Jira ticketing system.

11:12 10 Q. And when you said "assigning responsibilities,"
11 what does that look like? Is that you telling the
12 implementation consultant what part of the project
13 they're going to take on, or what exactly?

11:12 14 A. Yep, it would be that. You know, yeah,
15 exactly, because even with, like, time clocks, you know,
16 you know, we would have to specify -- Okay, you know,
17 technical team's going to do the server setup and make
18 sure that one clock is up and running, and then, you
19 know, you're responsible for making sure that you train
20 for that one clock and that IT knows how to go in and
21 set up the remaining clocks.

11:13 22 So, you know, again, based on the number
23 of hours in the contract, we may have -- there are
24 some -- in some cases, we would do a lot of setup for
25 the client. But if it was a smaller client or they

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1 purchased smaller hours, then I would work with the IC
2 to help them understand that, Okay, since we have a
3 smaller budget to work with, these are things that
4 you'll do, and then this is what you need to try to push
5 to the client in order to, you know, make sure that we
6 don't exceed the budget or have to go back and ask for
7 additional time.

11:13 8 Q. And then the second complete bullet point on
9 this second page, it says, "Efficiently and competently
10 manages problems, changed requirements, missed
11 deadlines, etc."

11:13 12 What problems would you be managing?

11:14 13 A. If something was missed. If, you know, a
14 technical call didn't take place and, you know, they
15 didn't understand that they were supposed to have
16 something completed by a certain date. Usually I would
17 have to go back and communicate that back to management
18 so that -- you know, that management could work with the
19 manager of the team that would actually complete that
20 task to see if we can get it pulled forward or, you
21 know, get it done.

11:14 22 If the user -- I'm sorry, the IC got in
23 and started doing training, and, you know, they were
24 receiving errors all over the place or deadlocked, you
25 know, messages or something like that, I would have to

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1 communicate that back to technical teams and management
2 to work through those issues.

11:14 3 You know, there's been times where we got
4 on the phone to do training and it's obviously the
5 client isn't paying attention. So just things of that
6 nature.

11:15 7 Q. So it sounds like, you know, there's a variety
8 of different problems, and depending on what the problem
9 was, you might have to loop in a different person to
10 help resolve that problem. Sometimes it might be
11 management; sometimes it might be tech support, it
12 sounds like.

11:15 13 A. That's correct.

11:15 14 Q. Is that fair?

11:15 15 A. Yes.

11:15 16 Q. Okay. And then you said "changed
17 requirements." What were -- what are you referring to
18 by "changed requirements"?

11:15 19 A. That would be, you know, if a client were to,
20 you know, go from wanting -- go from the web-based
21 trainings to on-site training, or if they're requesting
22 additional time for training because they want us to
23 train their users. So it would be changes to the
24 solution design.

11:15 25 So, typically, once they signed off on

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1 that solution design, if there was anything that came up
2 that would cause issues with the budget, then that would
3 be something that I would take back to management.

11:16 4 Q. And then so when you say you had to manage the
5 problems and changed requirements, you would escalate it
6 appropriately.

11:16 7 And then would you be responsible for
8 seeing through the -- you know, whatever the client was
9 wanting, whether it was changing to web based, that it
10 actually was implemented at the end of the day, that
11 they were able to change the solution design or --

11:16 12 A. That is correct.

11:16 13 Q. You stayed in contact with the client?

11:16 14 A. That is correct. Yeah, I would pretty much be
15 the -- the go-between between the client and management
16 and whatever decisions are made, and I would communicate
17 that between -- between all parties.

11:16 18 Q. So with this next bullet point -- it says,
19 "Schedules resources for each project and ensured
20 resources are sufficient." Who would be the resources
21 that you're referencing there?

11:16 22 A. Implementation consultants and other
23 cross-functional teams, like, the tech team, development
24 team, engineering team.

11:16 25 Q. So were you responsible for, when you had an

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1 implementation assigned to you, I guess, selecting the
2 IC to work through that implementation with you?

11:17 3 A. No. I had an assigned implementation
4 consultant. And so I -- that was the only
5 implementation consultant that I was -- that I was
6 booking for. That was the only resource that I would --
7 that I would, you know, schedule for as far as
8 implementation consultants.

11:17 9 Q. So what was -- oh, I'm sorry. Go ahead.

11:17 10 A. No, that's okay. Go ahead.

11:17 11 Q. So what would happen if the implementation
12 consultant that you typically worked with was not
13 available to take on a new project or maybe didn't have
14 the experience to handle the implementation?

11:17 15 A. In most cases, I would fill in. If I wasn't
16 able to fill in for whatever reason, then at that point
17 we would go to management, and management would talk to
18 other project managers to see if their ICs had any
19 flexibility.

11:18 20 And a lot -- in a lot of cases, especially
21 during that specific -- you know, the specific time
22 frame that we're talking about, they -- we had a lot of
23 new people. So it was kind of easy to pull in someone
24 else because it was an opportunity for them to test what
25 they'd been learning and then also kind of get their

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1 feet wet.

11:18 2 So depending on the type of training, as
3 long as it wasn't, like, configuration or admin, if it
4 was just, like, a basic user training or supervisor
5 training, usually they could step in. If it was
6 something more like an admin training or a payroll
7 export training, then I would -- I would step in just
8 for the -- you know, just to ensure that we kept the
9 ball rolling.

11:18 10 Q. Okay. So you kind of have, like, your default
11 implementation consultant; and then as needed, you could
12 pull in another one?

11:18 13 A. I could request that we can pull in another
14 one. I couldn't go to another IC and say, Hey, can you
15 step in for Suzi, or anything like that, no.

11:18 16 Q. So I think you said earlier you had, like,
17 20-plus projects going at a time.

11:19 18 So when you were managing 20-plus
19 projects, would it be feasible or did it happen that you
20 had more than just one IC that you'd be working with?

11:19 21 A. Would you mind repeating that?

11:19 22 Q. Yeah. I think earlier you said you had, like,
23 20 implementation products [sic] at a time specifically.

11:19 24 So when you were managing 20, across all
25 20, was it always your default IC, or would sometimes

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1 one of these other ICs that had been borrowed be mixed
2 into those 20 different projects?

11:19 3 A. Yeah, for me, it was always the one IC.

11:19 4 Q. Can you think of an instance where you had to
5 pull another IC in from a different project manager?

11:19 6 A. I cannot, huh-uh.

11:19 7 Q. Did you ever request one?

11:20 8 A. Honestly, I don't remember.

11:20 9 Q. And when you say there that you ensured
10 resources are sufficient, what are you referring to by
11 that?

11:20 12 A. Pretty much just making sure that -- you know,
13 whatever the timeline we were producing, that we had the
14 appropriate resources available for the dates that are
15 outlined in the timeline.

11:20 16 Q. And so that would be, you know, staffing
17 appropriately as well?

11:20 18 A. Yes.

11:20 19 Q. This next bullet point, you say, "Assists with
20 onboarding process for new hires through recruiting,
21 interviewing and hiring."

11:20 22 Explain to me a little bit, I guess, about
23 your role in the recruiting process.

11:20 24 A. Sure. So in the recruiting process, I --
25 during my time at Tyler, I referred, and they hired,

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1 gosh, probably seven -- seven to nine employees. So
2 recruiting would be actually just more so, you know,
3 people that I worked with in the past that were looking
4 for different -- new opportunities. You know, I sent
5 their résumé on to management for consideration.

11:21 6 Q. Do you remember who specifically you recruited
7 to Tyler? I know we talked about Ms. Greene.

11:21 8 A. Yeah. Ms. Greene, Latisha Harrison, my sister;
9 Jim McMain. There was a Nichole -- or Nichole Schrader
10 (phonetic). She's no longer with Tyler. There was a
11 Krista Bailey. She's no longer with Tyler. I'm trying
12 to think who else. So maybe it was five employees. I
13 feel like there was more, but I can't think of the
14 names.

11:22 15 Q. When you said you would interview new hires,
16 tell me about that and your responsibility there.

11:22 17 A. Sure. So usually anytime management had, you
18 know, done the first, initial interview, if it was
19 someone that they felt would be a good fit, they would
20 ask the team to do a team interview with that candidate.
21 And they would provide a -- they provided a list of
22 questions to help facilitate and drive conversation with
23 the new hire.

11:22 24 And so we would kind of do a roundtable
25 with myself and other project managers, and even in some

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1 split employees into different groups so that we can
2 configure the application to function, you know, the way
3 that it needs to based on their classification.

11:34 4 Q. Okay. So --

11:34 5 A. And a lot of times -- I'm sorry.

11:34 6 Q. No, go ahead. Go ahead.

11:34 7 A. Well, no, I was just going to say, a lot of
8 times, you know, that would cause the client to have to
9 go back and do some reengineering of their business
10 processes, which was to be expected. Most of our
11 clients came from paper timekeeping. And they were
12 going to electronic, so changes would have to be made,
13 and they recognized that.

11:34 14 Q. So "analyzing user requirements" would refer
15 to, I guess, kind of learning about the client's
16 business and processes, and it's applying your knowledge
17 of ExecuTime to under- -- to explain to them how it
18 would work with their specific protocols and policies?

11:35 19 A. Correct.

11:35 20 Q. And then sometimes that would result in the
21 client needing to change certain, I guess, procedures
22 they had?

11:35 23 A. Yes, that is correct.

11:35 24 Q. Can you think of a specific instance where a
25 client had to go back and change a policy or procedure

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1 based on your discussions with them?

11:35 2 A. I mean, I can't think of a specific time, no,
3 but, I mean, it would -- it would happen all the time
4 just because, again, you know, what their expectations
5 of the software are doing versus what ExecuTime could
6 actually do. That was a continuous, repetitive
7 conversation that we would have with clients, and they
8 would have to make adjustments accordingly.

11:36 9 Q. But you can't recall any specific adjustments
10 that clients had to make?

11:36 11 A. Well, I mean, the specific adjustments would
12 have to be the classification of the security roles and
13 things that we spoke about earlier.

11:36 14 Q. But that's stuff you're doing on Tyler's side.
15 Is there anything that you're aware of that clients had
16 to go do on their side after you had those conversations
17 with them?

11:36 18 A. Oh, I see what you're saying. I'm sorry. I
19 see what you're saying. Okay. Let me think about this
20 for a second.

11:36 21 I mean, the only thing I could really
22 think of is, like, if the client was expecting to be
23 able to require a certain group of employees to do
24 manual entry or clock in and out and then later realized
25 that -- because they actually have to have access to a

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1 computer or a time clock. And these users work in the
2 field. They don't report to an actual location.

11:37 3 They would have to go back and say, Okay,
4 never mind. You guys are not going to clock in and out
5 with a manual entry. We're going to prepopulate a time
6 card for you.

11:37 7 And then at some point, you know, within
8 the two-week or the one-month pay period, whatever the
9 case may be, the user would have to make sure that they
10 access the application at least one time and approve the
11 time card.

11:37 12 So I guess to summarize, you know, making
13 changes based on how they're expecting to do time entry
14 for certain groups.

11:37 15 Q. Any other changes you can think of that clients
16 have to make?

11:37 17 A. Well, they -- yeah, they would make changes to
18 when they run payroll, because, again, you know, they
19 were used to having paper time cards, and they had a
20 timekeeper or someone that manually went in there and
21 keyed everyone's time, verified it, to now having an
22 automated process.

11:37 23 So instead of having to do the payroll
24 processing, you know, by Monday at 12 a.m., they were
25 able to extend that a little bit more because everything

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1 was electronic. But that would be it.

11:38 2 Q. The next bullet point, it talks about analysis
3 you did for City of Buffalo, New York, Public Safety.

11:38 4 And I think -- is that analysis what we
5 were talking about earlier where you did the demo with
6 sales?

11:38 7 A. That's the one --

11:38 8 Q. I know --

11:38 9 A. Yeah. The demo with sales, that was -- I think
10 that was Troy, Michigan, we went to. This instance at
11 Buffalo was when myself and a Tyler -- another Tyler
12 project manager went on-site and sat down roundtable
13 with the team and discussed just, you know, what
14 ExecuTime offers and -- as far as functionality and
15 whatnot.

11:38 16 They threw scenarios at us, and we talked
17 through -- spoke through how we can -- how we could
18 accommodate that in ExecuTime and whether it would be
19 something we can automate or not.

11:39 20 Q. And then with the "Assists sales team as aid
21 during multiple sale demos onsite as well as over the
22 phone," that's what we were talking about earlier where
23 you said it was Troy, Michigan?

11:39 24 A. You got it. And there were --

11:39 25 Q. Okay.

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12:17 1 A. Oh, yes. I'm sorry. Yes. At the time when we
2 actually had implementation consultants, yes, they were
3 provided a copy.

12:17 4 Q. I think we talked about earlier how ExecuTime
5 was acquired in June of 2016. And it looks like the
6 dates in this project plan are 2017.

12:17 7 A. Uh-huh.

12:17 8 Q. Was it -- was it your understanding that in
9 2017, 2018, they still hadn't broken out the project
10 manager and implementation consultant role?

12:17 11 A. Yeah. If it was -- yeah, I want to say it was
12 getting closer to that 2018 year that they started
13 breaking that role out, if I'm not mistaken.

12:18 14 Q. So there's this tab down here labeled "Imp
15 Billing," which I --

12:18 16 A. Uh-huh.

12:18 17 Q. -- assume is for "implementation billing."

12:18 18 A. Uh-huh.

12:18 19 Q. Do you see that screen in front of you?

12:18 20 A. I do.

12:18 21 Q. And it looks like there's various individuals
22 listed under the "Completed By" column.

12:18 23 A. Uh-huh.

12:18 24 Q. Hillary, yourself, and Trey.

12:18 25 A. Okay.

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12:18 1 Q. We established earlier that Trey was an
2 implementation consultant; is that right?

12:18 3 A. That is correct.

12:18 4 Q. So it looks like Trey would have been working
5 on this implementation?

12:18 6 A. Yes, I agree.

12:18 7 Q. And so where -- were you responsible for, I
8 guess, managing this tab of the spreadsheet where there
9 was a breakdown of hours?

12:19 10 A. Yes.

12:19 11 Q. And how would you do that?

12:19 12 A. So ... Gosh, I don't even -- primarily, going
13 through the Jira tickets and just confirming. So as you
14 work the tasks -- a task in Jira, you would, you know,
15 like I said, enter your time that you're billing and
16 close that task out. And so I would just line this up
17 with the tasks in Jira.

12:19 18 Q. And the tasks in Jira, would they have this
19 description that's under the "Task" column? Is that
20 where this pulled from to --

12:19 21 A. Yeah. It's probably -- it's probably a summary
22 of, but -- let me see. Let me look at -- let me make
23 this a little bigger. I'm sorry. One second.
24 (Reviewing document.)

12:20 25 Some of them are the same and match up to

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1 the task, and some of them are -- well, weekly calls --
2 yeah, they do -- they do match with Jira.

12:20 3 Q. Okay. So you just would consult with Jira and
4 pull the tasks description out and the amount of hours
5 that were recorded in there?

12:20 6 A. Correct.

12:20 7 Q. And it says -- in this column over here labeled
8 "Billed Out," there's "yes" entered for it looks like
9 all the -- almost all the tasks. There's one down here
10 in row 97 that says "no charge."

12:20 11 A. Uh-huh.

12:20 12 Q. What -- what, I guess, tasks were billable, and
13 which tasks were not billable?

12:21 14 A. So, I mean, that was on a case-by-case basis.
15 And for the most part, it would be, you know,
16 whatever -- you know, some things, we would have to go
17 to management.

12:21 18 But, you know, I think I mentioned before
19 that we would have to update the tasks with the client's
20 name. That wasn't something that would be billable. Us
21 spending time to copy our email strand into the task,
22 that wouldn't be considered billable. If I was working
23 with Trey on, you know, understanding something so that
24 he could train or meet with the client, that wouldn't be
25 considered billable. The checklist I put together to

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1 assist him on knowing what to do and when, that wasn't
2 billable.

12:21 3 Q. And so was it something you just kind of used
4 your judgment on as to whether to bill it or not?

12:21 5 A. Between myself and -- and Jamie, we -- we would
6 have conversations about, you know -- yeah, like, you
7 know, what are some of the issues that we're seeing and,
8 you know, go back and forth about, you know, what we can
9 do to help.

12:22 10 Q. So the entry in here that wasn't billable --

12:22 11 A. Uh-huh.

12:22 12 Q. -- it looks like "internal discussion regarding
13 export change needed" --

12:22 14 A. Uh-huh.

12:22 15 Q. -- would that have been recorded in here as
16 well, and then you, after discussing it with Jamie,
17 would come back and mark it as nonbillable?

12:22 18 A. Yes.

12:22 19 Q. And was the purpose of maintaining this
20 document so you could tell how much billable time the
21 client had left for their implementation?

12:22 22 A. Yes.

12:23 23 Q. If we look up at the top of this document, it
24 looks like they had purchased 80 hours, and they have
25 just under five hours remaining?

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12:23 1 A. Yes.

12:23 2 Q. What -- I think we talked about this earlier,
3 but just to make sure, what happens if they run out of
4 time?

12:23 5 A. Management would, you know -- we -- management
6 would pretty much assess what's remaining or what's left
7 to be completed in the implementation. In some cases,
8 they would create a -- I forgot the acronym that they
9 use, but it was pretty much a nonbillable task just to
10 kind of get the project complete. But if it was a
11 substantial amount of time that would be needed, then
12 management would, you know, reach out to sales and
13 request a change order for additional hours or give us
14 approval to request additional hours.

12:23 15 Q. Okay. And that would all be triggered by, I
16 guess, once you have updated this tab or this
17 spreadsheet tab and finding out that they're out of
18 hours?

12:24 19 A. Well, we -- I mean, I would probably touch
20 every project almost daily -- if not daily, every other
21 day -- just because there's so many things going and so
22 many people pulling from the budget. So, you know, you
23 pretty much had to stay on top of that.

12:24 24 So, typically, once I saw the client got
25 down to a certain number of hours, maybe 15 or 20, I

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1 would assess and then start those conversations with
2 management.

12:24 3 Q. And it looks like here maybe there was some
4 time that was compensated with -- that you had spent
5 with Hillary?

12:24 6 A. Yes.

12:24 7 Q. And what would that have related to, if you
8 recall?

12:24 9 A. I don't. I don't know.

10 (Exhibit 6 marked.)

12:25 11 Q. Okay. I've shared with you what will be
12 Exhibit 6. Do you have that in front of you,
13 Ms. Harrison?

12:25 14 A. I do.

12:26 15 Q. Let's go over to this implementation timeline
16 tab. Is this another example of an implementation
17 project plan or a timeline that you would have created
18 as a project manager?

12:26 19 MR. HERRINGTON: Amanda, I'm going to
20 interrupt you for just a moment. Will you clarify for
21 me whether the spreadsheets that you're introducing as
22 exhibits, whether all of the tabs within it constitute
23 the exhibit or -- you know, or just what you've shown in
24 the video?

12:26 25 MS. BROWN: I was contemplating the entire

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1 document. I mean, if you want me to go back and click
2 through each tab, I can.

12:26 3 MR. HERRINGTON: I just want to make sure
4 that we're all on the same page about, you know, if --
5 if one tab in the PD- -- or in the Excel spreadsheet has
6 been introduced, that -- that when the exhibits are
7 created in PDF for the transcript, that the entire
8 contents will be included.

12:27 9 MS. BROWN: Yeah, yeah, that's what I was
10 contemplating. It's going to be -- you know, PDF in
11 Excel is always difficult. So we can certainly produce
12 these to you guys natively too if you have them.

12:27 13 MR. HERRINGTON: Okay. Thank you.

12:27 14 Q. So going back to Exhibit 6, Ms. Harrison, I
15 believe the question I had asked was whether this was
16 another example of a project -- or an implementation
17 project plan or timeline that you had created while you
18 were a project manager.

12:27 19 A. Yes. This would be one that I also updated,
20 yes.

12:27 21 Q. I'm sorry. I couldn't hear you. What did you
22 say?

12:27 23 A. It is.

12:27 24 Q. And it looks like this one has a "Go Live
25 Checklist" tab.

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12:27 1 A. Uh-huh.

12:27 2 Q. And we referred to that earlier. Is that
3 right? This is the document you referred to saying that
4 you would have to populate this to ensure that a client
5 was ready to go live?

12:28 6 A. Yes.

12:28 7 Q. And these are all the different tasks that they
8 would have gone through before they could go live?

12:28 9 A. Correct.

12:28 10 Q. And it looks like it has an area for the
11 project manager's signature?

12:28 12 A. Yes.

12:28 13 Q. So would you sign off on this go-live
14 checklist?

12:28 15 A. In most cases, we -- we wouldn't. So that
16 project manager's signature would be the client's
17 sign-off saying that those tasks had been completed and
18 that they had been trained.

12:28 19 Q. Okay. So the client has their own project
20 manager?

12:28 21 A. I'm sorry. Say that one more time.

12:28 22 Q. No, I didn't mean to interrupt you. I was just
23 trying to understand. So there's -- I guess the project
24 manager on Tyler's side is you, and then the client
25 would also have their own project manager?

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12:28 1 A. Oh. Yes. Yes, yes, yes. That is correct. We
2 would be -- there would be a project manager assigned on
3 the client's side as well.

12:28 4 Q. Okay. And that's who this contemplates
5 signing?

12:29 6 A. Yes. There is a place for both project
7 managers to sign, but typically we would -- we would not
8 print these off and sign off on them and store them
9 anywhere, from what I recall. I don't -- I don't recall
10 ever signing a checklist.

12:29 11 Q. And then going over to this implementation
12 project plan tab, this one looks a little different than
13 the one we just looked at as Exhibit 5 in the sense that
14 this one has more implementation team entries than
15 Exhibit 5 did.

12:29 16 A. Uh-huh.

12:29 17 Q. Do you -- do you have an understanding of why
18 different client resources were allocated on different
19 implementation timelines?

12:29 20 A. Yeah, the only thing I could -- only other
21 thing I could think of is whenever Trey's start date
22 was, and maybe he wasn't, you know, well versed in doing
23 some of those tasks, so I had to fill in for him,
24 because that -- that was the case. There was times
25 where I'd travel on-site for him and -- et cetera. So

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1 that's the only scenario I can think of. I'm not sure
2 when he started, but that could be the case.

12:30 3 Q. So sometimes, depending on the resources that
4 you had available to you, you kind of had to modify this
5 implementation timeline to reflect --

12:30 6 A. Yes.

12:30 7 Q. -- the resources available?

12:30 8 A. Right, correct.

12:30 9 Q. And then it looks like here there's an
10 "Implementation Services" tab. And that, again, would
11 contain the time spent or reported for this
12 implementation?

12:30 13 A. Of the billable portion, yes.

12:30 14 Q. And it looks like there was a division of tasks
15 between yourself and Trey?

12:30 16 A. Correct.

12:30 17 Q. And do you recall, I guess, approximately how
18 long Trey was the implementation consultant you worked
19 with?

12:31 20 A. I don't even know. I don't know that -- Trey
21 might have been there a year, maybe a year and a half.
22 I don't recall exactly. But I will say that Trey was my
23 first IC once they split those positions, so ...

12:31 24 Q. Okay. And you think he was there for about one
25 year?

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1 document.) Okay. (Reviewing document.) All right.
2 (Reviewing document.) Okay. (Reviewing document.)
3 Okay. (Reviewing document.) All right.

12:37 4 Q. That's the end of it. Do you recognize
5 Exhibit 7?

12:37 6 A. I do.

12:37 7 Q. And is this an email chain between you and the
8 client regarding updating the client's implementation
9 timeline?

12:37 10 A. Yes.

12:37 11 Q. And it looks like -- down to the bottom where
12 you initially emailed the client, you say, "Attached is
13 an updated copy of the Implementation Timeline and below
14 are the changes made."

12:37 15 What changes were you making to this
16 implementation timeline?

12:37 17 A. I mean, it sounds like there was some
18 misunderstanding as to what phase of the implementation
19 the client was on. I probably had had a call with
20 Brian, and so we were updating actual dates as to when
21 they parallel test versus go live.

12:38 22 Q. And do you recall how you were alerted to the
23 issue with, I guess, the misunderstanding as to the
24 phases?

12:38 25 A. I do not.

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12:38 1 Q. And when you updated this timeline to, I guess,
2 clarify the phases as to when they test and go live, is
3 that something that you had to provide management before
4 you did?

12:38 5 A. Yes.

12:38 6 Q. And what did that look like? Did you just
7 shoot an email to Hillary or Jamie and say, you know,
8 I'm updating to clarify the confusion on the
9 implementation phases?

12:38 10 A. Yes, that appears to be how I addressed it.

12:39 11 Q. And so is this email at the top here to Jamie
12 regarding a new timeline based on information Brian
13 gave -- is this you asking or, I guess, letting Jamie
14 know that you'd made the update?

12:39 15 A. Yes. We likely already talked about it. Like
16 I said, we would touch base often, and so we would talk
17 through things that we ran into such as this. And once
18 I made the change, I likely emailed Jamie to let her
19 know.

12:39 20 Q. So you would have told her, you know, something
21 along the lines of there is some confusion, it sounds
22 like, with the phases of the implementation; I'm going
23 to update the implementation timeline; and she would
24 have said, like, okay; and then you would have gone and
25 done it?

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12:39 1 A. I don't know that it would have gone that
2 smooth. She would have wanted to know why; you know,
3 what the issues were; is it on our end; is it the
4 client's end; is it something that, you know, we dropped
5 the ball on. There would be more in-depth conversation
6 about -- as -- you know, as to why the go-live date is
7 being moved.

12:40 8 Q. Okay. So you'd have to answer some questions
9 for her as to why the go-live was being moved?

12:40 10 A. Yes.

12:40 11 Q. And was -- moving the go-live date, was that
12 considered a significant change?

12:40 13 A. Yes.

12:40 14 Q. And why is that?

12:40 15 A. I can't answer why, but we were asked to report
16 those changes to management.

12:40 17 Q. Were there other changes to the implementation
18 timeline that you didn't have to report to management?

12:40 19 A. Only if -- you know, if there was a conflict.
20 Someone's not available, to a date-change move, or, you
21 know, something's not being completed, you know, based
22 on the time frame that I'm asking it to be done.

12:41 23 Q. So if there were conflicts or date changes or
24 something not being completed, those were areas you had
25 to run by the -- had to run by management?

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1 stayed within budget, correct?

12:45 2 A. Correct.

12:45 3 Q. How did you do that?

12:45 4 A. Just by managing the budget. You know,
5 frequent check-ins with the IC.

12:46 6 Q. So it would be using that kind of tracker that
7 we looked at as part of the implementation timeline and
8 then frequently checking in with the IC about the hours
9 that they were spending?

12:46 10 A. Right, and reviewing Jira tickets.

12:46 11 Q. And then if the project was getting close to,
12 like, exhausting the allotted hours, would you talk to
13 the implementation consultant about making sure that
14 they were careful with the hours they were billing?

12:46 15 A. Yes.

12:46 16 Q. Did you ever have a situation where you would
17 look at a Jira ticket and see how much an implementation
18 consultant had billed to a client and it didn't seem
19 correct to you?

12:46 20 A. Yes.

12:46 21 Q. What would happen in that situation?

12:47 22 A. There would be internal conversations with
23 management as well as the implementation consultant.

12:47 24 Q. So you would escalate that to management to
25 address?

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12:47 1 A. Yes.

12:47 2 Q. And in some instances, would that time be
3 written down or written off?

12:47 4 A. I mean, if we found it justifiable for whatever
5 reason, then, no, it wouldn't. We -- you know, we would
6 just kind of roll with it and manage things going
7 forward. And then in some instances, yes, NB tasks
8 would be created, and the IC would be told to report the
9 next hour to whatever -- to that NB task to kind of
10 balance things out.

12:47 11 Q. And when you were looking at the tickets and
12 you would see one where maybe the hours didn't seem
13 right, is that just based on kind of your experience
14 with these implementations, knowing how long it takes to
15 do certain tasks?

12:48 16 A. Yes.

12:48 17 Q. How were the different implementations assigned
18 to project managers?

12:48 19 A. Through management. Management would get a
20 project and assign it to whichever team had the
21 bandwidth.

12:48 22 Q. How is -- if you know, I mean, how did they
23 know what bandwidth different teams had?

12:48 24 A. I don't know. I mean, I know they knew how
25 many projects -- projects each person had. There were

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1 times where management would come and say, Hey, do you
2 think you can take another one? But, for the most part,
3 I mean, you had to take it.

12:48 4 Q. I think earlier you said you had, like, upwards
5 of 20 projects at a time. Is that right?

12:48 6 A. About 23, uh-huh.

12:48 7 Q. Twenty-three. And was that typical for the
8 other ExecuTime project managers?

12:49 9 A. No.

12:49 10 Q. How many did other ExecuTime project managers
11 typically have?

12:49 12 A. I mean, some had as little as, you know, 12 or
13 13. I think Jessie Bell would probably be right up
14 there with myself, where she would maintain, you know,
15 anywhere from 18 -- 18 or 19 projects at a time.

12:49 16 Q. Do you have an understanding of why you had
17 more projects than other project managers?

12:49 18 A. I mean, not really, outside of just having --
19 you know, being a senior project manager.

12:49 20 Q. So senior project managers handled more
21 projects at a time?

12:49 22 A. Yes.

12:50 23 Q. And was that -- did you feel like you were able
24 to handle more projects at a time because you were more
25 experienced on the project -- or more experienced with

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01:45 1 Q. More, like, substantively, what would that look
2 like? Was it like this client isn't grasping something;
3 I think they need, you know, more time, or they need
4 to -- I don't know. You tell me. What kind of --
5 substantively would those, like, escalations to you look
6 like?

01:46 7 A. Yeah, the request for more time; the request to
8 move dates. Like I said, there -- you know, requests
9 to -- you know, maybe the training was initially done
10 remotely and it wasn't good for the end users and they
11 wanted something, you know, on-site, a little bit more
12 personable.

01:46 13 Q. Did you -- did they ever come to you with any,
14 like, concerns about the budgeted hours for
15 implementation?

01:46 16 A. Yes, if they felt they were --

01:46 17 Q. What would that --

01:46 18 A. -- getting close to the budget.

01:46 19 Again, just emails or verbal conversations
20 so that I have what I need to understand, you know, why
21 are we running into this -- you know, how did we get to
22 a point we were reaching the budget, so that I could
23 have those conversations with management.

01:47 24 Q. And then after you have a conversation with
25 management, would you circle back with implementation

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01:58 1 So was the idea there that if this was
2 going to be shared with the implementation team as a
3 whole, you would add the project manager duties to this
4 document as well?

01:58 5 A. Yes.

6 (Exhibit 11 marked.)

01:59 7 Q. Okay. I've shared my screen, and you should
8 have in front of you Exhibit 11. Do you see that there,
9 Ms. Harrison?

01:59 10 A. I do.

01:59 11 Q. Okay. And let me know once you've had a chance
12 to review it and if you need me to scroll down so you
13 can see the remainder of the email.

02:00 14 A. (Reviewing document.) Okay.

02:00 15 Q. Let me scroll down for you.

02:00 16 A. (Reviewing document.) Okay. (Reviewing
17 document.) Okay.

02:00 18 Q. All right. And Exhibit 11, do you recognize
19 this as an email that you sent to Jamie Burns?

02:01 20 A. Yes.

02:01 21 Q. And this was sent to her on October 8th, 2019.
22 And it looks like you are discussing Brian, one of the
23 implementation consultants you worked with?

02:01 24 A. Yes.

02:01 25 Q. So it looks like you were planning to schedule

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1 a meeting with Jamie to talk about Brian. And you said,
2 kind of, We can still meet if you want, but it looks
3 like you already went ahead and talked to him about
4 feedback you had been getting? Is that right?

02:01 5 A. Yes.

02:01 6 Q. So what feedback did you provide to Brian?

02:01 7 A. At that time, you know, there were just
8 complaints where the client felt like they knew more of
9 the software than Brian. Some of the same issues that
10 we were seeing with Trey, where things weren't being
11 completed or followed through with.

02:02 12 Q. It looks like you told -- down in the third
13 paragraph, you say, "I told him if there is anything I
14 can do better to help him to let me know, even if that
15 means scheduling more time with him."

02:02 16 So it looked like you were making yourself
17 available to -- to Brian as a resource so he could try
18 and improve his performance?

02:02 19 A. Correct.

02:02 20 Q. Did his performance improve?

02:02 21 A. Not while he was under -- under myself as far
22 as being his project manager.

02:03 23 Q. Why were you sending Jamie this email about the
24 feedback that you had given to Brian?

02:03 25 A. Jamie and I, as well as Hillary, had already

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1 had conversation. They had gotten feedback as well.

02:03 2 Q. And what were the conversations you had had
3 with Hillary and Jamie about Brian?

02:03 4 A. Just discussions on, you know, some of the
5 things that clients were reporting back.

02:03 6 Q. Did you guys discuss what action should be
7 taken?

02:03 8 A. I believe Hillary and Jamie did make -- make
9 suggestions, but more so, just, you know, me making sure
10 that -- or making sure that he understands he needs to,
11 you know, communicate things, you know, with me as they
12 come up so that we can address them together.

13 (Exhibit 12 marked.)

02:04 14 Q. All right. Ms. Harrison, I've shared with you
15 what will be Exhibit 12. Do you see that in front of
16 you?

02:04 17 A. I do.

02:04 18 Q. And go ahead and take a look at it. Let me
19 know when you need me to scroll down so you can see the
20 whole email.

02:04 21 A. (Reviewing document.) Okay. (Reviewing
22 document.) Okay. (Reviewing document.) Okay.
23 (Reviewing document.) Okay. (Reviewing document.)
24 Okay. (Reviewing document.) All right, uh-huh.

02:07 25 Q. Do you recognize Exhibit 12?

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02:15 1 Q. Yeah, that makes sense.

02:15 2 So Brian, that you're referencing in this
3 sentence, that's the implementation consultant that we
4 have been discussing earlier?

02:15 5 A. Yes, ma'am.

02:15 6 Q. Brian Ledbetter, I believe.

02:15 7 So were you having Brian work on some of
8 the items that Suzi was having trouble completing?

02:16 9 A. Yes, during this time period. This was when
10 Brian was stepping in to assist Suzi. I believe Suzi
11 was out on leave.

02:16 12 Q. And then it looks like in this -- we'll scroll
13 down -- Dearborn, Michigan -- or, sorry, Missouri, there
14 is a second bullet. It says, "This clients weekly call
15 wasn't on my schedule for yesterday 03/06 so I missed
16 sitting in for this call even though it was in Hillary's
17 recap to me about filling in for Suzi. I was wrapped up
18 with working with Brian and it completely slipped my
19 mind."

02:16 20 A. Uh-huh.

02:16 21 Q. Is this what you're saying where Suzi was out
22 on leave, so you had taken over, I guess, her duties and
23 were working with Brian on, I guess, kind of filling in
24 for Suzi?

02:17 25 A. Yes.

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02:19 1 Is it fair to say you were trying to help
2 Suzi improve her performance?

02:19 3 A. Yes.

4 (Exhibit 14 marked.)

02:20 5 Q. Okay. I've shared with you what will be
6 Exhibit 14. Let me know if you have that in front of
7 you, and I can scroll through it so you can see the
8 entire document.

02:20 9 A. I see it. I can see it. Oh, I'm sorry. You
10 can scroll down. (Reviewing document.) Okay.

02:21 11 Q. So do you recognize Exhibit 14 as an email
12 exchange between you and Jamie Burns about Brian
13 Ledbetter's performance evaluation?

02:21 14 A. Yes.

02:21 15 Q. And Jamie was asking for you to give her your
16 feedback on Brian that she could include in his
17 performance evaluation?

02:21 18 A. Yes.

02:21 19 Q. I'm going to share with you the attachment to
20 Exhibit 14, which is the Brian Ledbetter performance
21 eval document.

22 (Exhibit 15 marked.)

02:22 23 Q. All right. Do you see that in front of you?
24 We'll make that Exhibit 15.

02:22 25 A. Yes.

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1 what was reported on that date, but ...

03:03 2 Q. And then it looks like for November -- the next
3 week, November 4th, there were no hours recorded again.
4 And then the following week was your last, I guess, week
5 recording time, and it looks like you recorded 28.25
6 hours?

03:03 7 A. Uh-huh.

03:03 8 Q. Were there any sort of guidelines about how
9 much time you were supposed to record per week?

03:03 10 A. Not per week, but for -- yes, we had quotas
11 that we had to meet and the -- yeah, we had quotas that
12 we had to meet.

03:04 13 Q. What were the quotas?

03:04 14 A. I'm trying to remember. For a project manager,
15 I don't remember exactly. It was a certain number of
16 days per month, but I don't remember the exact number.

03:04 17 Q. So it was not necessarily hours, but you had to
18 have so many days a month of billable time recorded?

03:04 19 A. Yes, that's correct.

03:04 20 Q. How many hours per week do you estimate that
21 you worked as a senior project manager?

03:04 22 A. Would you mind asking that one more time?

03:04 23 Q. Sure. How many hours per week did you
24 estimate -- do you estimate that you worked per week as
25 a senior project manager?

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1 working 60 to 65 hours a week at Tyler, you also had a
2 side business at World Ventures and then another side
3 business with Gimmie A Squeeze and then also formed your
4 nonprofit?

03:09 5 A. Yes.

03:09 6 Q. What would you estimate to be the job duties
7 that took the majority of your time as a senior project
8 manager?

03:10 9 A. Vamping up new hires, getting them prepared to
10 be able to conduct trainings on their own, and helping
11 them through understanding tasks and the timeliness of
12 that.

03:10 13 Q. And how much of a percentage of your time would
14 you estimate that that took up?

03:10 15 A. More than 50 percent of my day, on most days.

03:10 16 Q. Okay. And you said ramping up new hires. When
17 you're referring to "new hires," is that implementation
18 consultants and project managers?

03:11 19 A. More so, implementation consultants.

03:11 20 Q. But also some new PMs?

03:11 21 A. That is correct.

03:11 22 Q. And then second to the time you spent ramping
23 up new hires to conduct trainings on their own, what
24 would be the next responsibility you had that took up
25 the most -- majority of your time or the most amount of

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1) your time?

03:11 2 A. Sure. Creating implementation timelines and,
3 you know, mapping out resources to complete the
4 different -- the various tasks.

03:11 5 Q. When you say "mapping out resources," what do
6 you mean by that?

03:11 7 A. Just, you know, reviewing their calendars and
8 checking their availability to complete trainings and
9 things.

03:12 10 Q. So this would be for the implementation
11 consultants?

03:12 12 A. Yes, ma'am.

03:12 13 Q. And would this also include people from the
14 development team or tech support as well?

03:12 15 A. Yes.

03:12 16 Q. And how much of your time would you estimate
17 that you spent on that responsibility?

03:12 18 A. I'd say maybe 30 percent of my time.

03:12 19 Q. And then what would you say took up the
20 remaining balance of your time, the 20 percent that's
21 left?

03:12 22 A. You know, following up on support issues, issue
23 resolution, transition to support calls, updating and
24 managing, you know, Jira tickets, and doing the large
25 amount of copy/pasting emails from -- you know,

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1 copy/pasting emails and making sure that stuff's in
2 Jira, and just kind of keeping up with those tasks in
3 Jira to ensure that they're closed out and being handled
4 in a timely manner.

03:13 5 Q. What about the time that you spent conducting
6 training? Where would that fall?

03:13 7 A. Good question. I would say issue -- you know,
8 along with the issue resolution and stuff, because
9 typically the only time I was pulled in to conduct
10 training is when there was an issue with the original
11 trainer.

03:14 12 Q. So that would fall into the 20 percent
13 category?

03:14 14 A. Yeah, give or take, uh-huh.

03:14 15 Q. Then what about conducting calls with clients?

03:14 16 A. I guess that would fall in with the whole, you
17 know, managing of the project. The budget, timelines,
18 you know, communication with management as to where
19 projects stand.

03:14 20 Q. That would be that second category, 30 percent?

03:14 21 A. Correct.

03:14 22 Q. When you said ramping up new hires and conduct
23 training on their own took about 50 percent of your
24 time, what all went into ramping up new hires?

03:14 25 I know we've talked about the feedback

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1 that you would provide, listening to calls that they
2 would conduct. What else would go into that?

03:15 3 A. Spending one-on-one time with them; you know,
4 training them on the application to increase their
5 knowledge; you know, assisting them with troubleshooting
6 issues with support that they'd run into that I'm not
7 able to, you know, address right off the bat; creating
8 cheat sheets, just Word document cheat sheets to help
9 them, you know, stay organized and keep up with action
10 items that came up to ensure they follow up.

03:15 11 Q. So would that be similar to kind of the summary
12 and checklists that you had -- that we saw earlier where
13 you'd list out each project and kind of where it was and
14 what you expected from the IC with respect to that
15 project and -- something like that?

03:16 16 A. Yes, ma'am.

17 (Exhibit 18(A) marked.)

03:16 18 Q. All right. Ms. Harrison, I've shared with you
19 what will be Exhibit 18(A). Let me know if you've got
20 that up in front of you and when you need me to scroll
21 down so you can see the entire document.

03:16 22 A. Okay, I'm ready.

03:17 23 Q. Did it freeze for you? It froze on my end.

03:17 24 A. Yes, it is frozen.

03:17 25 Q. There we go.

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03:19 1 Q. And this is the application that you completed
2 for the implementation analyst role?

03:19 3 A. Yes.

03:19 4 Q. How did you learn about the role being
5 available?

03:19 6 A. Talent would send out weekly, and even
7 sometimes multiple times a week, available job
8 opportunities.

03:20 9 Q. So you saw this in an internal job email alert
10 and decided it was something you'd be interested in?

03:20 11 A. Yes.

03:20 12 Q. And what did the application process entail?

03:20 13 A. I first had to get approval from my manager,
14 and then you would just -- I think once you have that
15 approval form, you would -- I believe I printed that out
16 along with an updated copy of my résumé, and I emailed
17 it to the HR person responsible for that position.

03:20 18 Q. And then did you have an interview?

03:20 19 A. Yes.

03:20 20 Q. Who interviewed you?

03:20 21 A. Kayla Wagner and Michelle ... I don't remember
22 her last name, but she's Kayla's manager.

03:21 23 Q. Okay. And in Exhibit 19, you say, "My personal
24 goal has been to obtain a position that allows me to
25 help other PMs and potentially ICs with less experience

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1 achieve some of same milestones."

03:21 2 So were you moving into the implementation
3 analyst role with the idea that you would be able to
4 help PMs and ICs with their implementation issues?

03:21 5 A. Yes.

03:22 6 Q. Then you also say, "Currently I have the most
7 experience within my department and that had lead me to
8 a place of wanted to do more for our entoral" --
9 "entoral teams" --

03:22 10 A. Yeah.

03:22 11 Q. -- "as I see so much growth opportunity" --
12 or -- "growth opportunity and potential within the team
13 I'm currently working with."

03:22 14 So you were the most senior project
15 manager on the ExecuTime team?

03:22 16 A. That's correct.

03:22 17 Q. So I guess based on this description that I'm
18 reading, it sounds like the reason you wanted to move
19 roles is you just wanted to be able to do more for
20 supporting the implementation consultants and project
21 managers? Is that fair to say?

03:23 22 A. I mean, what initially led me to start looking
23 for other positions was the number of hours I was having
24 to spend managing the number of projects that I had and
25 not really, you know, getting what I needed from the

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1) team to support the efforts that were going into my
2) implementations.

03:23 3) I'd actually had, you know, conversations
4) with our general manager in regards to, you know, being
5) able to focus more on helping ICs and PMs rather than
6) manage projects within the ExecuTime realm, but I was --
7) I was shut down, so I started seeking other
8) opportunities.

03:23 9) Q. And who is the GM you had these conversations
10) with?

03:23 11) A. His name was -- oh, my gosh. What was his
12) name? Greg ... I can't think of his last name. But it
13) was in verbal conversations. We had a couple of
14) different meetings, and then also there was a recap
15) email that was sent. His name's right -- Greg Savard.
16) Sorry. Greg Savard.

03:24 17) Q. Savard, S-a-v-a-r-d?

03:24 18) A. You got it. Yes.

03:24 19) Q. And when did these conversations occur?

03:24 20) A. It would have been the earlier part of 2019,
21) prior to me making the decision to explore -- you know,
22) explore other opportunities.

03:24 23) Q. You said you began looking because of the
24) number of hours and the, I guess, lack of support you
25) felt you had in the project manager role.

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03:28 1 A. Lawson (phonetic), Oklahoma.

03:28 2 Q. And you said the vice president of
3 implementation services asked if you'd go.

03:28 4 Who is that, specifically?

03:28 5 A. Jennifer Turgeon.

03:29 6 Q. And what did you understand had happened that
7 resulted in issues with the go-live date for that
8 project?

03:29 9 A. The IC had went in there and ran an automatic
10 integration -- I'm sorry. The payroll export. The
11 automation of the payroll export was not working
12 properly, and so the IC on that project made the
13 decision to do a manual upload, and it blew up.

03:29 14 Q. And then what did you do to assist with the
15 cleanup?

03:29 16 A. I had to travel out there. They wanted me
17 there Monday morning, so I drove out there Sunday. And
18 hosted multiple training sessions. You know, it -- it
19 ended up being a lot more than what was initially
20 discussed. It wasn't just a matter of fixing their
21 payroll export stuff. It was reconfiguring ExecuTime in
22 a lot of areas so that the calculations were being
23 correctly handled.

03:30 24 Q. So what did you do to reconfigure ExecuTime?

03:30 25 A. So I, you know, trained -- you know, worked

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1 with the team there at Lawson and trained them on their
2 options on handling different things. They had a lot of
3 overtime rules that were misfiring and not calculating
4 overtime correctly, putting the overtime on the wrong
5 week. So we corrected -- you know, manually corrected
6 the overtime configurations.

03:30 7 Same thing with shift differential. There
8 were situations where shift differential should have
9 been paid but it wasn't, vice versa.

03:31 10 So I just worked with the team on
11 identifying, you know, those issues and reconfiguring
12 the rules that had been previously set up.

03:31 13 Q. And do you know why Jennifer came to you to ask
14 for you to do this?

03:31 15 A. I don't. I don't recall.

03:31 16 Q. Had you been involved in that project before?

03:31 17 A. Yes, yes.

03:31 18 Q. How long were you on-site?

03:31 19 A. One week. From Sunday to Saturday.

03:32 20 Q. And were they able to successfully go live at
21 the end of the week?

03:32 22 A. They were definitely in a much -- a much better
23 position, yes. They were able to, you know, cut checks
24 to their employees. And the situation was so bad that,
25 you know, like, people that have child support and other

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1 things that come out of their paycheck didn't calculate.

03:32 2 So by the time I left, they were able to
3 generate those checks to send to the parents and -- yes,
4 I don't know that they actually officially -- well, I
5 guess, yeah, they were still considered live, so, yes.
6 I'm sorry. There was just a lot of manual work for
7 multiple pay periods to keep them live.

03:32 8 Q. And who was the project manager on that
9 project?

03:33 10 A. Bobbi Davis. Bobbi, B-o-b-b-i. Last name,
11 Davis.

03:33 12 Q. And you said you traveled to project management
13 summits in Austin. Were these just kind of like
14 conferences for different employees?

03:33 15 A. Yes, they were. We had stations set up and --
16 you know, based on the type of employee, yes.

03:33 17 Q. And how long did those conferences last?

03:33 18 A. Three days.

03:33 19 Q. Did other implementation analysts attend those
20 conferences?

03:33 21 A. Not that I'm aware of. None from my team. I
22 don't know of any other team.

03:34 23 Q. Were these conferences that you were invited to
24 or conferences that you asked to go to?

03:34 25 A. Conference that I was invited to, and I was --

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1 I was asked to do --

03:34 2 Q. Who invited you?

03:34 3 A. -- a presentation.

03:34 4 Kayla Wagner.

03:34 5 MR. HERRINGTON: Amanda, whenever it's
6 good for you, I'd like to take a brief, five-minute
7 restroom break.

03:34 8 MS. BROWN: Yeah. Let me just get through
9 this, and then we can. Almost there.

03:34 10 MR. HERRINGTON: Okay.

03:34 11 Q. You said you presented at those conferences?

03:34 12 A. Yes. I had a small segment where I did a
13 quick, 30-minute, you know, "Here's what's new with
14 ExecuTime" type presentation.

03:35 15 Q. And who would you be presenting to? Who was
16 the audience for that?

03:35 17 A. Other Tyler project managers.

03:35 18 Q. You'd be educating project managers on new
19 features with ExecuTime?

03:35 20 A. That's correct.

03:35 21 Q. And would you -- did you put together, like,
22 PowerPoints for these presentations?

03:35 23 A. I did not. The presentation was provided to
24 me.

03:35 25 Q. Who provided it to you?

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03:35 1 A. Kayla Wagner.

03:35 2 Q. Did you make any changes to the presentation?

03:35 3 A. Not that I recall.

03:36 4 Q. You said you traveled to Maine a couple of
5 times to conduct ExecuTime trainings for ICs and PMs
6 there.

03:36 7 Tell me about the training that you
8 provided in Maine.

03:36 9 A. It was classroom style. I would have my laptop
10 hooked up to a projector, and I was -- well, I'm sorry.
11 The first training that I attended, I literally flew out
12 there my first day in that role, and I observed Kayla
13 conducting the ExecuTime training.

03:36 14 And then the next time they flew me out
15 there, I conducted the training. It was classroom
16 style, just going through the ExecuTime application, set
17 up basic users, you know, how supervisors use the
18 system, that type of thing.

03:37 19 Q. So were you teaching, I guess, implementation
20 consultants and project managers how they would
21 configure ExecuTime?

03:37 22 A. Not really. More so just showing them what's
23 available. The majority of those users that attended
24 that, they've already seen and trained on ExecuTime in
25 some capacity. And so it was more just a way -- an

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1 opportunity for them to address questions, us to discuss
2 issues that they are running into, that type of thing.

03:37 3 Q. And you were able to, I guess, have these kind
4 of trainings and answer these questions based on your
5 experience with ExecuTime?

03:37 6 A. Yes.

03:37 7 Q. Were there any other implementation analysts
8 for the ExecuTime product?

03:37 9 A. No, not at the time that I was there, no.

03:38 10 Q. And the implementation analyst position, was
11 that a new role at Tyler when you applied for it?

03:38 12 A. Yes.

03:38 13 Q. And did you have any discussions with Kayla or
14 anyone during the application process about why that
15 role had been created?

03:38 16 A. I mean, she may have told me why it was
17 created, but -- but, no, I didn't inquire as to why.

03:38 18 Q. Did you have an understanding of why the
19 company had created that role?

03:38 20 A. I understood the need for it, yes.

03:38 21 Q. What did you understand the need for that role
22 to be?

03:38 23 A. Just to, you know, assist all of the Tyler PMs
24 and ICs with implementations that they were taking on
25 for ExecuTime.

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03:40 1 Off the record at 3:40 p.m.
2 (Recess taken from 3:40 to 3:49.)
03:49 3 THE VIDEOGRAPHER: Back on the record,
4 3:49 p.m.
5 (Exhibit 20 marked.)
03:49 6 Q. All right. Ms. Harrison, I've shared with you
7 what will be Exhibit 20. Do you see the document in
8 front of you?
03:49 9 A. I do.
03:49 10 Q. And let me know after you've had a chance to
11 review it or if you need to scroll down.
03:49 12 A. Okay. (Reviewing document.) Okay. (Reviewing
13 document.) Okay. (Reviewing document.) Okay.
03:51 14 Q. Is Exhibit 20 an accurate description of the
15 implementation analyst job duties?
03:51 16 A. Yes.
03:51 17 Q. Did you say "yes"?
03:51 18 A. Yes.
03:51 19 Q. Sorry. Didn't hear you.
03:51 20 So on the second bullet point down, it
21 says, "Provide leadership in the creation of 'best
22 practice' templates, process improvements and knowledge
23 transfer materials."
03:51 24 Do you see that?
03:51 25 A. Yes.

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03:51 1 Q. So tell me a little about -- what "best
2 practice" templates were you creating?

03:52 3 A. I don't recall creating any.

03:52 4 Q. What about "process improvements"? Do you
5 recall working on any process improvements as an
6 implementation analyst?

03:52 7 A. No.

03:52 8 Q. And what about knowledge transfer materials?

03:52 9 A. Yes.

03:52 10 Q. What knowledge transfer materials did you
11 create?

03:52 12 A. So out on SharePoint, it was just quick how-tos
13 as far as configuration, how to set up a specific type
14 of pay code, accrual code combination. I documented the
15 Jira tickets that I worked to ensure, you know, whatever
16 steps were taken to resolve the issue were noted. And
17 then I created knowledge base standard -- "KBS articles"
18 is what we referred to them as.

03:53 19 Q. KBFRs?

03:53 20 A. Articles.

03:53 21 Q. Oh, KB --

03:53 22 A. KBS.

03:53 23 Q. -- articles?

03:53 24 A. Yes, ma'am.

03:53 25 Q. What were those?

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03:53 1 A. They were just quick knowledge base standard
2 forms, that we -- you know, we take the information from
3 the ticket we were working and basically just transfer
4 what the question was and what we did to resolve that
5 issue.

03:53 6 Then that was made accessible to internal
7 teams as well as clients so that they can, you know,
8 check that database before they report an issue to see
9 if there's already a resolution out there.

03:54 10 Q. Okay. So you would be putting together stuff
11 kind of based on your experience or the issues you were
12 seeing, and then --

03:54 13 A. In support.

03:54 14 Q. -- the ICs or PMs could use that to resolve
15 issues that they were encountering with an ExecuTime
16 implementation?

03:54 17 A. Yes.

03:54 18 Q. There's a bullet point that says, "Provide
19 non-billable informational sessions by webinar to
20 implementation consultants or their clients."

03:54 21 Do you recall informational sessions that
22 you -- or webinars that you participated in?

03:54 23 A. Yes.

03:54 24 Q. Can you tell me about those?

03:54 25 A. Sure. Just, you know, as I'm working a ticket,

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1 and then also being on-site. I don't know what
2 percentage that would be.

04:24 3 Q. What would you say took up the majority of your
4 time as an implementation analyst?

04:25 5 A. Caseload. The number of cases that were coming
6 in from the project managers and IC, as well as the
7 number of cases that were existing at the time I joined
8 the team.

04:25 9 Q. And that would be in the form of either the CRM
10 tickets or I- -- ICs and PMs reaching out to do team
11 meetings? That is kind of what you mean by "caseload"?

04:25 12 A. Yes, ma'am.

04:25 13 Q. And how much of your time would you say that
14 took up?

04:25 15 A. More than a hundred percent.

16 (Exhibit 24 marked.)

04:26 17 Q. Okay. Ms. Harrison, I've introduced what will
18 be Exhibit 24.

04:26 19 A. Okay.

04:26 20 Q. Do you have that in front of you?

04:26 21 A. I do.

04:26 22 Q. And are you familiar with Exhibit 24? Bigger
23 for you.

04:26 24 A. Oh, thank you. Yes, I am familiar with it.

04:26 25 Q. And is Exhibit 24 the alternative work schedule

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1 evaluation you received at the end of 2020 for the
2 implementation analyst role. Correct?

04:33 3 A. Uh-huh, yes.

04:33 4 Q. And here -- so this would have been from Kayla?

04:33 5 A. Correct.

04:33 6 Q. And did you meet with her to go over these
7 performance reviews?

04:34 8 A. Yes.

04:34 9 Q. It says here under "Knowledge Transfer," "Talía
10 was able to transfer her knowledge in multiple ways,
11 including KCS articles, Confluence page
12 creation/updates, OE sessions and 'ExecuTime 101'
13 training sessions."

04:34 14 I know we talked about those Confluence
15 page creation/updates. And I think you mentioned the
16 KCS articles, but I wasn't quite sure what those are.
17 Can you tell me a little bit more about what those are?

04:34 18 A. Sure. I think I was referring to them as "KBS"
19 articles. That's my apologies for that. But those are
20 the just -- quick articles that we would create for the
21 ICs, project managers, as well as our clients. We would
22 make them client facing for them to quickly troubleshoot
23 issues.

04:34 24 So they could search an error message on
25 our KCR -- KCS articles, and if it's something that was

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1 reported and an article was created, it would come up
2 and usually produce steps to resolve that issue or give
3 them knowledge of the fact that it's a known issue and
4 when it's expected to be corrected.

04:35 5 Q. What about "OE sessions"?

04:35 6 A. "OE sessions"? Those are the -- me going to
7 Maine to conduct ExecuTime training sessions.

04:35 8 Q. What does "OE" stand for, if you know?

04:35 9 A. Ongoing education.

04:35 10 Q. And what about the "'ExecuTime 101' training
11 sessions"?

04:35 12 A. I'm not really sure what that -- I believe that
13 that's going to be -- that was, you know, just me
14 meeting independently with PMs or ICs as they reported
15 issues, and training them, you know, on -- wait. Sorry
16 for the noise, if you can hear that in the background.

04:36 17 There were forums that I would have to
18 host, like, just quick, 30-minute to an hour forums that
19 would take place every quarter. And during that forum,
20 we would come up with content that would need to be
21 discussed on that forum. Usually it's new functionality
22 or, hey, this is what's new on our analyst Confluence
23 page, that type of thing.

04:36 24 Q. So they're kind of educational events?

04:36 25 A. Yes, ma'am. Uh-huh.

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IN THE UNITED STATES DISTRICT COURT
FOR THE EASTERN DISTRICT OF TEXAS
SHERMAN DIVISION

REPORTER'S CERTIFICATION
ORAL AND VIDEOTAPED DEPOSITION OF
TALIA N. HARRISON
JANUARY 19, 2022

I, LEAH K. OSTEEEN DOW, Certified Shorthand Reporter in and for the State of Texas, hereby certify to the following:

I further certify that pursuant to FRCP Rule 30(f)(1) that the signature of the deponent:

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1 any changes and the reasons therefor;


2 _____ was not requested by the deponent or a
3 party before the completion of the deposition.

4 I further certify that I am neither counsel
5 for, related to, nor employed by any of the parties or
6 attorneys to the action in which this proceeding was
7 taken. Further, I am not a relative or employee of any
8 attorney of record in this cause, nor am I financially
9 or otherwise interested in the outcome of the action.

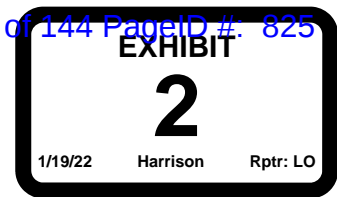
10 Ms. Brown - 6 hours, 23 minutes

11 Mr. Herrington - 0 hours, 12 minutes

12 Subscribed and sworn to on this the 26th day
13 of January, 2022.

14
15
16
17
18 
LEAH K. OSTEE DOW, Texas CSR # 392
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Persistent and highly enthusiastic professional consisting of 11+ years of diversified experience with proven ability to contribute to ever changing initiatives while maintaining a focus on established goals. Demonstrated ability to teach, coach and develop teams, while remaining passionate in impacting performance internally & externally. Dedicated with motivation to maintain and contribute to team & organization wide success. Consistently function with the highest level of integrity while influencing peers to do the same.

CAPABILITIES INCLUDE:

- Leadership & Mentorship • Business Process Improvement • Training
- Conflict Resolution • Positive Client Relationship Management

PROFESSIONAL EXPERIENCE**Senior Project Manager, Tyler Technologies – ExecuTime Software**

09/13– *present*

- Works directly with client Stakeholders, sales and technical staff to ensure project responsibilities are thoroughly and precisely defined as well as documented
- Successfully implemented 50+ ExecuTime Time & Attendance implementations including The City of Muskogee, OK whom agreed to a press release
- Works directly with enterprise-level clients to ensure effective setup and support
- Maintains and circulates user administrative documentation for internal/external use
- Maintains client-specific notes and documentation regarding all interactions and issues to facilitate future client interactions
- Estimates and plans projects from start to finish, with built-in contingencies
- Manages, monitor and motivates the cross functional team assigned to each project
- Trains enterprise-wide on time and attendance application to end users/supervisors ranging from entry-level staff to senior executives.
- Coordinates with Payroll and HR management to ensure strict deadlines were met for a smooth, manageable transitions
- Creates and delivers customized ExecuTime client training sessions via the web and/or on-site visits to ensure client satisfaction and product knowledge.
- Conducts trainings for Subject Matter Experts and demonstrated new product functionality for clients as well as internal staff (new & existing)
- Continuously consults with Stakeholders regarding their specific company operations in order to recommend best utilization and customization of ExecuTime configuration
- Responsible for completion of projects on time, on budget and on specification. Performs a variety of tasks including, but not limited to, scheduling all resources; setting deadlines;

assigning responsibilities; and monitoring, summarizing and communicating the progress of the project.

- Ensures all customer communications are handled in a polite and professional manner
- Efficiently and competently manages problems, changed requirements, missed deadlines, etc
- Schedules resources for each project and ensured resources are sufficient
- Assists with onboarding process for new hires through recruiting, interviewing and hiring
- Lead and advocated for overall resolution of customer incidents and problem management
- Continuously strived to promptly communicate incident status to customers and internal staff
- Analyzed, provided recommendations, documented and tested system feature enhancement with Tyler-ExecuTime Director of Product Strategy & Operations
- Identified and escalated incidents to development and/or management when needed
- Analyzed, recommend and document system development priorities for new ExecuTime features and change requests submitted by customers
- Worked with development staff to ensure deadlines are established and met for customer incidents; efficiently
- Responsible for identifying and analyzing user requirements, procedures, and problems to improve workflow
- Conducted onsite analysis for the City of Buffalo, NY Public Safety in an effort to assist the Executive Sales team with sales lead
- Assists sales team as aid during multiple sale demos onsite as well as over the phone.
- Travels to perspective clients to perform analysis on internal practices & filter questions/concerns directly related to ExecuTime Software.
- Managed and maintain daily work completion report per trainer to asset daily productivity

Training Manager, *MedEvolve, LLC*
05/2006-09/2013

- Coordinate and schedule new install training
- Assign trainers to new installs
- Create and manage training schedules for employees
- Distribute daily workload
- Coach and provide feedback to employees regarding productivity and performance
- Provide feedback to managers and sales representatives regarding employee and customer concerns
- Develop training materials for process changes/ updates
- Conduct monthly evaluations so that performance can be reviewed, and assistance can be given in the areas needed
- Receive, document, and distribute customer concerns and create corrective action plans in order to resolve issues
- Conduct training for new and existing employees
- Conduct training for clients via phone, internet and onsite
- Conduct System Verifications (Assess how Medical Practice runs day to day operations)
- Follow-up Client Training
- Liaison between Client and Implementation Coordinator as well as EDI Specialist
- Training Mentor to Junior Trainers
- Perform Quality Assurance of new and revised reports for Development
- Creation and publication of training manuals
- Assessment of existing clients to ensure all training has been conducted
- Provide technical support to trainers while onsite
- Developed, implemented and maintained Webinars

Software knowledge:

SQL, Outlook, Office365, CRM, Salesforce, AS400, GoToMeeting/GoToAssist, Confluence, JIRA, Concur Solutions & varies VPN providers

References

References are available on request.

PALM DESERT, CA & EXECUTIME - IMPLEMENTATION PROJECT PLAN

EXHIBIT

5

1/19/22

Harrison

Rptr: LO

	PROJECT TASKS	EXECUTIME RESOURCES	CLIENT RESOURCES	ONSITE / REMOTE	STATUS	TARGET DUE DATE	ACTUAL COMPLETION	ADDITIONAL NOTES
TIMEKEEPING DESIGN	Welcome Packet provided to client	Pro Services Cord.	Project Manager	Remote	Complete	5/8/2017	5/8/2017	
	Questionnaire /Agenda Provided to client	Pro Services Cord.	Project Manager	Remote	Complete	5/22/2017	5/18/2017	
	Stakeholder Kick Off Meeting	Project Manager	Implementation Team	Remote	Complete	6/14/2017	6/14/2017	Scheduled for 6/14 @ 8:30am
	Project Plan Timelines Finalized	Project Manager	Project Manager	Remote	Complete	7/21/2017	9/5/2017	9/1/2017 - Sent updated PP.
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	7/21/2017	9/5/2017	See "Milestone Acceptance" tab
	Completed Questionnaire returned To ExecuTime	Project Manager	Implementation Team	Remote	Complete	6/30/2017	7/5/2017	
	Questionnaire Review Meeting with client	Project Manager	Implementation Team	Remote	Complete	7/7/2017	7/6/2017	
	Hardware & Integration Planning	Project Manager	Implementation Team	Remote	Complete	7/7/2017	7/5/2017	
	Creation of Solution Design & Scope of Work	Project Manager	Implementation Team	Remote	Complete	7/14/2017	7/11/2017	7/11 - 1st draft sent. 7/14- 2nd draft sent. 7/18 - 8/30 - SD check-ins. Signoff provided on 8/30.
	Signed & Approved Solution Design Document	Project Manager	Implementation Team	Remote	Complete	7/21/2017	8/30/2017	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Implementation Team	Remote	Complete	7/21/2017	8/30/2017	See "Milestone Acceptance" tab
HARDWARE / INTEGRATION	Completed VPN Document	Project Manager	IT Dept	Remote	Complete	6/30/2017	7/5/2017	See "Connectivity" tab-client will complete
	Completed Connectivity Documentation	Project Manager	IT Dept	Remote	Complete	6/30/2017	7/5/2017	See "Connectivity" tab-client will complete
	Test connectivity to Payroll Server	Project Manager	IT Dept	Remote	Complete	7/7/2017	7/7/2017	7/7 - Successfully able to ping Payroll Server.
	Test remote connectivity to client Server	Technical Team	IT Dept	Remote	Complete	7/7/2017	7/6/2017	
	Verify minimum hardware specs are met	Project Manager	IT Dept	Remote	Complete	7/7/2017	7/7/2017	Not applicable for Cloud clients
	Application server install	Integration	N/A	Remote	Complete	7/14/2017	7/11/2017	Scheduled w/ TSM OSDBA Team
								Solution Design sign-off provided on 8/30/2017. 9/1 - Updated PP provided; all dates changed from this point.
	Dept, Employee, Benefit Accrual Query	Integration	N/A	Remote	Complete	7/14/2017	9/5/2017	Sungard OneSolution. 9/1 & 9/5 - Reached out for dept. info again.
	Dept, Employee, Benefit Accrual Integration Programs	Integration	N/A	Remote	Complete	9/12/2017	9/14/2017	
	Project Costing Query	Integration	N/A	Remote	Complete	9/6/2017	1/12/2018	7/11 - Requested by 7/21. 10/16- sent project.csv again to acquire info.
	Project Costing integration programs	Integration	N/A	Remote	Complete	9/12/2017	1/28/2018	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	9/12/2017	1/12/2018	See "Milestone Acceptance" tab
	System Integration Signoff & Acceptance	Project Manager	Project Manager	Remote	Complete	9/19/2017	9/20/2017	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	9/19/2017	9/20/2017	See "Milestone Acceptance" tab
	Power User Training Session (Part I)	Project Manager	Implementation Team	Remote	Complete	9/29/2017	9/27/2017	Scheduled for 9/27/17. See "Trainings" tab
	Power User Training Session (Part II)	Project Manager	Implementation Team	Remote	Complete	9/29/2017	9/29/2017	Scheduled for 9/29/17.
	Power User Training Session (Part III)	Project Manager	Implementation Team	Remote	Complete	9/29/2017	10/16/2017	Scheduled for 10/16/17.
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	9/29/2017	12/14/2017	See "Milestone Acceptance" tab

PALM DESERT, CA & EXECUTIME - IMPLEMENTATION PROJECT PLAN

	PROJECT TASKS	EXECUTIME	CLIENT RESOURCES	ONSITE / REMOTE	STATUS	TARGET	ACTUAL	ADDITIONAL NOTES
		RESOURCES				DUE DATE	COMPLETION	
TRAININGS AND CHECKLIST								Slight project delay (10/16- 11/15) 11/15 - email to get project back on track. 11/29 - Provided updated project plan. Pending Acceptance. Additional project delay (11/16- 12/29). 12/29 - Hillary emailed to get project back on track, and provided additional updated PP. 1/31/18- Provided Final Updated PP
	Production Go Live Planning	Project Manager	Implementation Team	Remote	Pending	10/12/2018	TBD	
	Power User/System Admin Checklist	Project Manager	Implementation Team	Remote	Complete	4/11/2018	4/11/2018	Original due date was 10/13/2017. Updated due date was 12/22/2017. 1/31 *Due date: 2/9/18
	End User Training-Timekeeping	Project Manager	Implementation Team	Remote	Complete	5/10/2018	5/10/2018	See "Trainings" tab - Train the trainer format
	Super User Training-Timekeeping	Project Manager	Implementation Team	Remote	Complete	5/10/2018	5/10/2018	See "Trainings" tab - Train the trainer format
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	10/26/2018	10/26/2018	See "Milestone Acceptance" tab
	End/Super User Training Checklist	Project Manager	Implementation Team	Remote	Complete	10/26/2018	10/26/2018	See "Go Live Checklist" tab
	Payroll Export Training/Test	Project Manager	Payroll Team	Remote	Complete	5/24/2018	5/24/2018	See "Trainings" tab
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	10/26/2018	10/26/2018	See "Milestone Acceptance" tab
PAYROLL	Payroll export integration programs	Project Manager	N/A	Remote	Complete	10/10/2018	10/10/2018	
	Apply and Test Payroll export (internal)	Project Manager	N/A	Remote	Complete	10/10/2018	10/10/2018	
PILOT TESTING	Identify employees who are in pilot test	Project Manager	Project Manager	Remote	Complete	9/8/2017	9/13/2017	
	Establish pay period dates for pilot test (#1)	Project Manager	Project Manager	Remote	Complete	9/8/2017	9/5/2017	
	Establish pay period dates for pilot test (#2)	Project Manager	Project Manager	Remote	Complete	2/2/2018	2/2/2018	
	Launch pilot testing for 1st full pay period	Project Manager	Project Manager	Remote	Complete	3/3/2018	3/3/2018	Pay Period Test #2: 3/3 - 3/16.
	Client sign off on pilot test #1	Project Manager	Project Manager	Remote	Complete	3/21/2018	3/21/2018	Export: 3/21/2018
	Launch pilot testing for 2nd full pay period	Project Manager	Project Manager	Remote	Complete	3/17/2018	3/17/2018	Pay Period Test #2: 3/17 - 3/30.
	Client sign off on pilot test #2	Project Manager	Project Manager	Remote	Complete	4/4/2018	4/4/2018	Export: 4/4/2018
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Complete	4/4/2018	4/4/2018	See "Milestone Acceptance" tab

PALM DESERT, CA & EXECUTIME - IMPLEMENTATION PROJECT PLAN

	PROJECT TASKS	EXECUTIME RESOURCES	CLIENT RESOURCES	ONSITE / REMOTE	STATUS	TARGET DUE DATE	ACTUAL COMPLETION	ADDITIONAL NOTES
DEPLOY	Established / Target Go Live Date (#1)	Project Manager	Project Manager	Remote	Pending	11/24/2018	TBD	
	ExecuTime in Production!	Project Manager	Project Manager	Remote	Pending	11/24/2018	TBD	
								LIVE Pay Period: 3/31 - 4/13 (Export: 4/18/2018)
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Pending	11/24/2018	TBD	See "Milestone Acceptance" tab
	Introduction to Client Support Team	Project Manager	Project Manager	Remote	Pending	1/24/2018	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Open	1/24/2018	TBD	See "Milestone Acceptance" tab
	Project Closure / Project Sign Off	Project Manager	Project Manager	Remote	Open	1/24/2018	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Project Manager	Remote	Open	1/24/2018	TBD	See "Milestone Acceptance" tab

* End of Project Plan Document *

* Client will NOT utilize clocks *

TIME CLOCKS	Send sample badge to ExecuTime for testing	Project Manager	Project Manager	TBD	Open	6/14/2017	TBD
	Determine badge id vendor (if applicable)	Project Manager	Project Manager	TBD	Open	6/14/2017	TBD
	Procure timeclock hardware	Project Manager	Project Manager	TBD	Open	7/5/2017	TBD
	Ensure clock locations have network connectivity	N/A	IT Dept	TBD	Open	7/19/2017	TBD
	Provides list of IP addresses for Timeclocks	Project Manager	IT Dept	TBD	Open	7/19/2017	TBD
	Technical Clock Configuration Training	Project Manager	IT/Project Manager	N/A	N/A	N/A	TBD



*This document indicates that the following activities/milestones have been satisfactorily completed and that Palm Desert, CA authorizes Tyler Technologies executime to proceed to the next step in the implementation/project closure.

PROJECT PLAN TIMELINE ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Project plan timelines are mutually accepted by Tyler and Client	J. Moore	9/5/2017	
*Updated dates to be selected by 12/8/2017			
CLIENT PROJECT MANAGER SIGNATURE	Janet Moore (provided signature)	DATE: 9/5/2017	

SOLUTION DESIGN ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Signed and Approved Solution Design	J. Moore	8/30/2017	Signed
Application Server Install	Tyler OSDBA Team	7/11/2017	Signed
CLIENT PROJECT MANAGER SIGNATURE	Janet Moore (provided signature)	DATE: 9/5/2017	

DATA INTEGRATION ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Employee integration Sign Off	C. VonHelf	9/20/2017	Signed
Leave Accrual Benefit Sign Off	C. VonHelf	9/20/2017	Signed
Project Costing Sign Off	J. Moore	1/12/2018	Signed
CLIENT PROJECT MANAGER SIGNATURE	Clayton Von Helf (provided signature)	DATE: 09/20/2018	

TRAINING ACCEPTANCE & PROCEED TO PRODUCTION ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Power User Training Acceptance	Clayton Von Helf (provided signature)	4/18/2018	
End User/Super User Training(s) Acceptance	Clayton Von Helf (signature needed)	10/26/2018	Signed
Payroll Export Training Acceptance	Clayton Von Helf (signature needed)	10/26/2018	Signature needed
Client completed Go Live Checklist	Clayton Von Helf (signature needed)	10/26/2018	Signature needed
Payroll Export Acceptance Test	Clayton Von Helf (signature needed)	10/26/2018	Signature needed
CLIENT PROJECT MANAGER SIGNATURE		DATE	

PRODUCTION ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
ExecuTime In Production!	Clayton Von Helf (signature needed)	pending	Signature needed
First full pay period processing	Clayton Von Helf (signature needed)	pending	
Transition to Support	Clayton Von Helf (signature needed)	pending	
CLIENT PROJECT MANAGER SIGNATURE		DATE	

PROJECT ACCEPTANCE - Palm Desert, CA

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Project Closure/Project Sign off	Clayton Von Helf (signature needed)	Pending	
CLIENT PROJECT MANAGER SIGNATURE		DATE	

GO LIVE CHECKLIST

	PROJECT TASKS	COMPLETED BY:	COMPLETION DATE	NOTES
ADMIN TRAINING	Review pay codes for accuracy			
	Verify benefit accrual balances for accuracy	City of Palm Desert, CA team	9/20/2017	
	Create/Review Supervisor security roles & permissions for accuracy	City of Palm Desert, CA team		
	Review and test overtime policy	City of Palm Desert, CA team		
	Review and test comp policy	City of Palm Desert, CA team		
	Create schedules and apply to employees	City of Palm Desert, CA team		9/80 Schedules
	Verify job costing codes for accuracy	City of Palm Desert, CA team		
	Review holiday schedule for accuracy	City of Palm Desert, CA team	N/A	Palm Desert will not use Holiday Schedules. Employees will manually enter on their time cards.
	Review and test salary timecards with auto hours	City of Palm Desert, CA team	N/A	Palm Desert will not use salary policies - 10/17: Turned off all flags on emply. Types.
	Confirm payroll interface has been installed by payroll vendor	City of Palm Desert, CA team	9/20/2017	
Above tasks must be completed before moving forward to the next training				
USER & SUPERVISOR TRAINING	Ensure employees have access to ExecuTime URL	City of Palm Desert, CA team		
	Test user authentication. Ensure all users can login	City of Palm Desert, CA team		
	Verify users have access to appropriate system menus	City of Palm Desert, CA team		
	Ensure all employees have received proper training & documentation	City of Palm Desert, CA team		
	Ensure all supervisors have received proper training & documentation	City of Palm Desert, CA team		
Above tasks must be completed before moving forward to the next training				
PILOT TESTING	Identify employees to be included pilot test	City of Palm Desert, CA team	9/14/2017	
	Establish pay period dates for the pilot test	City of Palm Desert, CA team	9/5/2017	
	Launch pilot testing for two full pay periods	City of Palm Desert, CA team		
	Test payroll export of timecards with pilot group	City of Palm Desert, CA team		
	Client approval of payroll export data	City of Palm Desert, CA team		
Above tasks must be completed before moving forward to the next training				
DEPLOY	Establish Go Live Date	City of Palm Desert, CA team	9/5/2017	
	Communicate with internal personnel	City of Palm Desert, CA team		
	ExecuTime in Production!	City of Palm Desert, CA team		

PROJECT MANAGER SIGNATURE

DATE

PROJECT MANAGER SIGNATURE

DATE

End of Document

PROJECT CHANGE LOG AND ACTION ITEMS

Date Submitted	Submitted By	Change Request or General Action Item	Approved By	Statement of Issue	Additional Notes	Assigned Ref#	Issue Owner	Resolved? Y/N/P/U*

*Y=Yes, N=No, P=Partially, U=Unknown

Connectivity

Environment		
Network Connectivity		
	VPN Type (ie Cisco/Cisco Any Connect -etc)	
	IP address	
	Username	
	Password	
	Domain	
	Any additional information	
Server Connectivity		
	IP address (Internal)	
	IP address (External for employees to access application)	
	Username	
	Password	
	Domain	
Database Connectivity		
	IP address	
	Database Name	
	Database User	
	Database Password	
Payroll Database Connectivity		
	Payroll Name	
	Type (Web Interface, Database, Flat File)	
	IP address	
	Database Name	
	Database Username	
	Database Password	
	Library(if applicable)	

ExecuTime Training Sessions

Course Title	Estimated Duration	Course Description
Administration Session	3 hour	This course will provide an overview of basic employee functions and supervisor functions. Topics will include time entry screens, timecard approval, supervisory timecard maintenance, managing time-off requests, pay codes, employee files, security roles, policy and rule set up such as overtime, comptime, shift differential along with schedules and job costing fields, holiday set up, payroll functions, and user interface options. It is recommended for all members of the implementation team to attend this course.
Basic Employee/User	1 hour	This course is intended to familiarize the basic employee with ExecuTime. The employee will learn how to log in to ExecuTime, clock in/out, view the time sheet, view benefit hours, request time off and other data related to the employee's time and attendance. ALL supervisors should be required to attend this session as well.
Supervisor Training	1 hour	This course is designed for supervisors who will review and approve employee time cards. The supervisor will learn how to maintain and edit employee time cards, manage time off requests, approve time cards for payroll and run selected reports.
Payroll Export	1 hour	This course will demonstrate and review how to balance time cards for a specific period and move the data into the payroll system. Typically the payroll department employees attend this class. All Time Balancers should attend Basic Employee and Supervisor Training as well. This course is scheduled AFTER the payroll export programming has been completed.



*This document indicates tasks & time spent on the Palm Desert, CA Timekeeping Project

T&A Professional Services

Total Hours Purchased

80

Remaining Hours Balance

4.75

Breakdown of Hours

Task	Hours Used	Completed By	Billed Out
Total time spent with Hillary	0.00	Hillary	yes
Set email notifications to allow	0.25	Talia	Yes
Communication tab configuration	0.25	Talia	yes
Weekly call scheduling	0.25	Trey	yes
Missed weekly call 02/08	0.25	Talia	yes
Weekly call 02/15/2018	1.50	Talia	yes
Attempt to schedule user trainings	0.50	Trey	yes
updating project hours	0.25	Trey	yes
Weekly call (03/01/2018)	0.50	Trey	yes
Missed weekly call 03/08/2018	0.25	Trey	yes
Updated Project plan	0.25	Trey	yes
Missed weekly call (03/15/2018)	0.25	Talia	yes
Missed weekly call 03/22/2018	0.25	Talia	yes
Missed weekly call/Call into Project sponsor (03/29/2018)	0.50	Talia	yes
Impl. Discussion	0.25	Talia	yes
Project Call coordination	0.25	Talia	yes
Updated timeline	1.00	Talia	yes
Received PU checklist/sign off	0.25	Talia	yes
Updated Impl. Hours & OneDrive	0.25	Talia	yes
Trey - Billed - Scheduling weekly project call	0.50	Trey	Yes
Trey - Billed - Scheduling End User / Supervisor Training	0.75	Trey	Yes
Trey - Partially Billed 1h 15 min - Joe and Sally Configuration	1.25	Trey	Yes
Trey - Billed - Updating Project Plan	0.25	Trey	Yes
Trey - Billed - Weekly Project Call	0.75	Trey	Yes
Trey - Billed - Project Call Recap Email	0.50	Trey	Yes
Trey - Billed - Rescheduling Payroll Training and Project Call	0.25	Trey	Yes
Trey - Billed - Updating the End User Training Handout	0.75	Trey	Yes
Trey - Billed - Weekly Project Call	0.25	Trey	Yes
Trey - Billed - Updating Manage Own Data Flag	0.75	Trey	yes
Trey - Billed - Reviewing Joe and Sally Set up	1.25	Trey	yes
Trey - Billed - Palm Desert, CA - End User Training (up to 2 sessions)	2.50	Trey	yes
Trey - Billed - Palm Desert, CA - Super User Training (2 sessions)	2.50	Trey	yes
Trey - Billed - Scheduling Configuration Changes Call	0.25	Trey	yes
Trey - Billed - Updating UI setting for Declined Time Off Request	0.25	Trey	yes
Trey - Billed - Setting up Schedule sets and adjusting employee profiles.	1.25	Trey	yes
Trey - Billed - Responding to Pay Period Question	0.25	Trey	yes
Trey - Billed - Weekly Project Call	1.25	Trey	yes
Trey - Partially Billed 15 min - Scheduling Pay Period Call	0.25	Trey	yes
Trey - Billed - Reviewing items and config from the project call	0.75	Trey	yes
Trey - Billed - Changing 8 hr salary employees to salaried	2.50	Trey	yes
Trey - Billed - Call to discuss schedule set up and pay periods	0.50	Trey	yes
Trey - Billed - Updating schedules and pay periods for employees	3.00	Trey	yes
Trey - Billed - Weekly Project Call	0.75	Trey	yes
Trey - Partially Billed 1h 30m - Correcting the Flex Schedules	1.50	Trey	yes
Trey - Billed - Responding to Clayton about Schedules	0.25	Trey	yes
Trey - Billed - Meeting to discuss Pay Periods	0.50	Trey	yes
Trey - Billed - Created backup DB and turned off update flag for pay periods.	0.25	Trey	yes
Trey - Billed - Updating employee history for the pay period changes	1.25	Trey	yes
Trey - Billed - Call with Development to discuss schedules export	0.25	Trey	yes
Trey - Billed - Emailed Clayton information needed for payroll export	0.50	Trey	yes
Trey - Billed - Weekly Project Call and Recap Email	1.00	Trey	yes
Trey - Billed - Confirming Pay Day	0.25	Trey	yes
Trey - Billed - Weekly Project Call and Recap Email	1.00	Trey	yes
Trey - Billed - Corrected the 1st Monday Schedule	0.50	Trey	yes
Trey - Billed - Amber Molina Schedule	0.50	Trey	yes
Trey - Billed - Apply the JAR	0.25	Trey	yes
Trey - Billed - Tested the Payroll Preview	0.25	Trey	yes
Trey - Billed - Emailed Palm Desert to validate the payroll preview	0.25	Trey	yes
Trey - Billed - Weekly Project Call and recap email	2.00	Trey	yes
Trey - Billed - Updating Project Plan	0.25	Trey	yes
Trey - Billed - Answering Project Call Questions	1.50	Trey	yes
Trey - Billed - Weekly Project Call and Recap Email	2.00	Trey	yes
Updated implementation timeline	0.25	Talia	yes
Wrote payroll export design & next steps	1.00	Talia	yes
Changes to the payroll export	0.50	Talia	yes
Trey help	0.25	Talia	yes
Add'l Changes to the payroll export	0.25	Talia	yes
Training escalation	0.25	Talia	yes
Project call 06/19/2018	1.00	Talia	yes
Project Call	2.00	Talia	yes
Trey - Billed - Turning off update flag in SQL and setting data to test prior to 7/6	0.75	Trey	yes
Trey - Billed 2 hour - Default Pay code on timesheet / Incorrect Hours	2.00	Trey	yes
Trey - Billed - Weekly Project Call and Recap Email	1.00	Trey	yes
Project Call 06/27/2018	1.25	Talia	yes
Updated Implementation hours	0.25	Talia	yes
Project Call 06/28/2018	1.75	Talia	yes
Request to change export to flat file	1.25	Talia	yes
Weekly call cancellation	0.25	Talia	yes
Weekly Project Call 07/12/2018	0.75	Talia	yes
Updated Implementation TL & Hours	0.50	Talia	yes
Change to export, from DB to Flat File	0.25	Talia	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 09/10 - 09/14)	1.25	Trey	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 09/17 - 09/21)	0.75	Trey	yes
Payroll export change	0.50	Talia	yes
Internal discussion regarding export change needed	0.00	Talia	no
Generated DB back up for dev ticket	0.25	Talia	yes
Additional export changes	1.00	Talia	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 09/24 - 09/28)	0.50	Trey	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 10/08 - 10/12)	2.75	Trey	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 10/15 - 10/19)	3.75	Trey	yes
Trey - Palm Desert, CA - Weekly Meeting, Tasks & Calls (Week: 10/22 - 10/26)	0.75	Trey	yes
Impl. Hours and Project plan updates	0.25	Talia	yes
Payroll export changes/assistance	0.25	Talia	yes
Additional export changes	0.50	Talia	yes
Follow up on export changes	0.25	Talia	yes
Project call & action items	2.00	Talia	yes
Go live confirmation email	0.25	Talia	yes

20 hours spent with Hillary (comped)

no charge

Total Duration

75.25

GO LIVE CHECKLIST

	PROJECT TASKS	COMPLETED BY:	COMPLETION DATE	NOTES
POWER USER TRAINING	Review pay codes for accuracy			
	Verify benefit accrual balances for accuracy			
	Create supervisor permission roles			
	Review basic employee security role(s) & permissions for accuracy			
	Review and test overtime policies			
	Review and test comp policies			
	Create schedules and apply to employees (if applicable)			
	Verify job costing codes for accuracy (if applicable)			
	Review holiday schedule for accuracy			
	Review and test salary timecards with auto hours			
	Confirm payroll interface has been installed by payroll vendor			
Above tasks must be completed before moving forward to the next training				
END USER & SUPER USER TRAINING	Ensure employees have access to ExecuTime URL			
	Test user authentication. Ensure all users can login.			
	Verify users have access to appropriate system menus			
	Ensure all employees have received proper training & documentation			
	Ensure all supervisors have received proper training & documentation			
Above tasks must be completed before moving forward to the next training				
PILOT TESTING	Identify employees to be included pilot test			
	Establish pay period dates for the pilot test			
	Launch pilot testing for one full pay period			
	Test payroll export of timecards with pilot group			
	Client approval of payroll export data			
Above tasks must be completed before moving forward to the next training				
DEPLOY	Establish Go Live Date			
	Communicate with internal personnel			
	ExecuTime in Production!			

PROJECT MANAGER SIGNATURE

DATE

PROJECT MANAGER SIGNATURE

DATE

End of Document



IMPLEMENTATION PROJECT PLAN

PROJECT TASKS		CLIENT RESOURCES	ONSITE / REMOTE	STATUS	TARGET DUE DATE	ACTUAL COMPLETION	ADDITIONAL NOTES
TIMEKEEPING DESIGN	Welcome Packet provided to client	Project Manager	Remote	Complete	3/9/2018	3/9/2018	
	Questionnaire /Agenda Provided to client	Project Manager	Remote	Complete	3/19/2018	3/19/2018	
	Stakeholder Kick Off Meeting	Implementation Team	Remote	Complete	3/19/2018	3/19/2018	
	Project Plan Timelines Finalized	Project Manager	Remote	Pending	10/26/2018	TBD	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Pending	10/26/2018	TBD	See "Milestone Acceptance" tab
	Completed Questionnaire returned To ExecuTime	Implementation Team	Remote	Complete	4/5/2018	TBD	
	Hardware & Integration Planning	Implementation Team	Remote	Complete	3/19/2018	3/19/2018	
	Solution Design & Scope of Work Discussion with client	Implementation Team	Remote	Complete	4/6/2018	4/6/2016	
	Signed & Approved Solution Design Document	Implementation Team	Remote	Complete	6/4/2018	6/4/2018	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Implementation Team	Remote	Complete	6/4/2018	6/4/2018	See "Milestone Acceptance" tab
HARDWARE / INTEGRATION	Completed VPN Document (if applicable)	IT Dept	Remote	NA	NA	NA	See "Connectivity" tab-client will complete
	Completed Connectivity Documentation	IT Dept	Remote	NA	NA	NA	Will use GOTOMEETING to connect to server
	Test connectivity to Payroll Server	IT Dept	Remote	NA	NA	NA	
	Test remote connectivity to client Server	IT Dept	Remote	NA	NA	NA	
	Verify minimum hardware specs are met	IT Dept	Remote	Complete	5/29/2018	5/29/2018	Not applicable for Cloud clients
	Application server install	N/A	Remote	Complete	5/29/2018	5/29/2018	
	Dept, Employee, Benefit Accrual Query	N/A	Remote	Pending	10/12/2018	TBD	
	Dept, Employee, Benefit Accrual Integration Programs	N/A	Remote	Pending	10/12/2018	TBD	
	Project Costing Query (if applicable)	N/A	Remote	Pending	10/12/2018	TBD	
	Project Costing integration programs (if applicable)	N/A	Remote	Pending	10/12/2018	TBD	
	****Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Pending	10/26/2018	TBD	See "Milestone Acceptance" tab
	System Integration Signoff & Acceptance	Project Manager	Remote	Pending	10/26/2018	TBD	
TIME CLOCKS	Send sample badge to ExecuTime for testing	Project Manager	Remote	NA	NA	NA	
	Determine badge id vendor (if applicable)	Project Manager	Remote	NA	NA	NA	
	Procure timeclock hardware	Project Manager	Remote	NA	NA	NA	
	Ensure clock locations have network connectivity	IT Dept	Remote	NA	NA	NA	
	Provides list of IP addresses for Timeclocks	IT Dept	Remote	NA	NA	NA	
TRAININGS AND CHECKLIST	Power User Training	Implementation Team	Remote	Open	11/30/2018	TBD	See "Trainings" tab
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	12/31/2018	TBD	See "Milestone Acceptance" tab
	Power User Checklist	Implementation Team	Remote	Open	12/31/2018	TBD	See "Go Live Checklist" tab
	Production Go Live Planning	Implementation Team	Remote	Open	12/3/2018	TBD	
	Technical Clock Configuration Training	IT / Project Manager	Remote	NA	NA	NA	
	End User Training - Timekeeping	Implementation Team	Remote	Open	2/11/2019	TBD	This training is inteded for pilot group users (SMEs). Users attending these trainings would be expected to begin paraleles with pay period start 02/11/2019
	Super User Training - Timekeeping	Implementation Team	Remote	Open	2/11/2019	TBD	This training is inteded for pilot group users (SMEs). Users attending these trainings would be expected to begin paraleles with pay period start 02/11/2019
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	2/19/2019	TBD	See "Milestone Acceptance" tab
	End User/Super User Training Checklist	Implementation Team	Remote	Open	2/19/2019	TBD	See "Go Live Checklist" tab
	Payroll Export Training	Payroll Team	Remote	Open	3/18/2019	TBD	This training would take place the later part of the week once city's true payroll has been completed.
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	3/25/2019	TBD	See "Milestone Acceptance" tab

IMPLEMENTATION PROJECT PLAN

PROJECT TASKS		CLIENT RESOURCES	ONSITE / REMOTE	STATUS	TARGET DUE DATE	ACTUAL COMPLETION	ADDITIONAL NOTES
PAYROLL	Payroll Export Integration Programs	N/A	Remote	Open	12/31/2018	TBD	
	Apply and Test Payroll Export (internal)	N/A	Remote	Open	1/7/2019	TBD	
PILOT TESTING	Identify Employees Who are in Pilot Group	Project Manager	Remote	Open	12/3/2018	TBD	
	Establish Pay Period Dates for the Pilot Test	Project Manager	Remote	Open	12/3/2018	TBD	
	Launch Pilot Testing #1 for One Full Pay Period	Project Manager	Remote	Open	2/17/2019	TBD	
	Client Sign Off on Pilot Test 1	Project Manager	Remote	Open	3/23/2019	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	3/23/2019	TBD	See "Milestone Acceptance" tab
	Launch Pilot Testing #2 for One Full Pay Period	Project Manager	Remote	Open	3/17/2019	TBD	
	Client Sign Off on Pilot Test 2	Project Manager	Remote	Open	4/21/2019	TBD	
DEPLOY	Established / Target Go Live Date	Project Manager	Remote	Open	4/21/2019	TBD	
	ExecuTime in Production!	Project Manager	Remote	Open	4/21/2019	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	4/21/2019	TBD	See "Milestone Acceptance" tab
	Introduction to Client Care Team	Project Manager	Remote	Open	6/21/2019	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	6/21/2019	TBD	See "Milestone Acceptance" tab
	Project Closure / Project Sign Off	Project Manager	Remote	Open	6/21/2019	TBD	
	**** Acceptance Milestone Sign Off (see Milestone Tab)****	Project Manager	Remote	Open	6/21/2019	TBD	See "Milestone Acceptance" tab

* End of Project Plan Document *

PROJECT CHANGE LOG AND ACTION ITEMS

Date Submitted	Submitted By	Change Request or General Action Item	Approved By	Statement of Issue	Additional Notes	Assigned Ref#	Issue Owner	Resolved? Y/N/P/U*

*Y=Yes, N=No, P=Partially, U=Unknown



**This document indicates that the following activities/milestones have been satisfactorily completed and that the {CLIENT} authorizes Tyler Technologies executime to proceed to the next step in the implementation/project closure.*

PROJECT PLAN TIMELINE ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Project plan timelines are mutually accepted by Tyler and Client	Melissa Goss/Ryan Bredehoeft	10/26/2018	Milestone signature needed
CLIENT PROJECT MANAGER SIGNATURE		DATE	

SOLUTION DESIGN ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Signed and Approved Solution Design	Melissa Goss/Ryan Bredehoeft	6/4/2018	Milestone signature needed
Application Server Install	Melissa Goss/Ryan Bredehoeft	6/5/2018	Milestone signature needed
CLIENT PROJECT MANAGER SIGNATURE		DATE	

DATA INTEGRATION ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Employee integration Sign Off	Melissa Goss/Ryan Bredehoeft	10/26/2018	Milestone signature needed
Leave Accrual Benefit Sign Off	Melissa Goss/Ryan Bredehoeft	10/26/2018	Milestone signature needed
Payroll Export Acceptance Test	Melissa Goss/Ryan Bredehoeft		
CLIENT PROJECT MANAGER SIGNATURE		DATE	

TRAINING ACCEPTANCE & PROCEED TO PRODUCTION ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Power User Training Acceptance	Melissa Goss/Ryan Bredehoeft		
Payroll Export Training Acceptance	Melissa Goss/Ryan Bredehoeft		
End User/Supervisor Training(s) Acceptance	Melissa Goss/Ryan Bredehoeft		
Time Clock Training Acceptance	Melissa Goss/Ryan Bredehoeft		
Client completed Go Live Checklist	Melissa Goss/Ryan Bredehoeft		
CLIENT PROJECT MANAGER SIGNATURE		DATE	

PRODUCTION ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
First full pay period processing	Melissa Goss/Ryan Bredehoeft		
ExecuTime in Production!	Melissa Goss/Ryan Bredehoeft		
Transition to Customer Care	Melissa Goss/Ryan Bredehoeft		
CLIENT PROJECT MANAGER SIGNATURE		DATE	

PROJECT ACCEPTANCE

TASKS COMPLETED	COMPLETED BY:	COMPLETION DATE	NOTES
Project Closure/Project Sign off	Melissa Goss/Ryan Bredehoeft		
CLIENT PROJECT MANAGER SIGNATURE		DATE	

ExecuTime Training Sessions

Course Title	Estimated Duration	Course Description
Power User Training (System Administration)	3 hour	This course will provide an overview of basic employee functions and supervisor functions. Topics will include time entry screens, timecard approval, supervisory timecard maintenance, managing time-off requests, pay codes, employee files, security roles, policy and rule set up such as overtime, comptime, shift differential along with schedules and job costing fields, holiday set up, payroll functions, and user interface options. It is recommended for all members of the implementation team to attend this course.
Time Clock/Device	1 hour	This course will review the general connectivity and polling parameters for clock devices. A demonstration of the basic functionality of the time clock will be reviewed. The specifics of the course will depend greatly on the brand and module of time devices. This course is intended for IT staff and System Administrators.
End User Training	1 hour	This course is intended to familiarize the general employee with ExecuTime. The employee will learn how to log in to ExecuTime, clock in/out, view the time sheet, view benefit hours, request time off and other data related to the employee's time and attendance. ALL supervisory employees should be required to attend this session as well.
Super User Training	1 hour	This course is designed for users with a supervisory role (e.g. supervisors, department heads, etc.) who will review and approve employee time cards. The super user will learn how to maintain and edit employee time cards, manage time-off requests, approve time cards for payroll and run selected reports.
Payroll Export	1 hour	This course will demonstrate and review how to balance time cards for a specific period and move the data into the payroll system. Typically the payroll department employees attend this class. All Time Balancers should attend Basic Employee and Supervisor Training as well. This course is scheduled AFTER the payroll export programming has been completed.



This document details time spent on the Oregon City, OR Implementation.

T&A Professional Services

Total Hours Purchased 96
 Remaining Balance 77.50

Breakdown of hours

Task	Duration (hours)	Billed?	Completed by
Questionnaire, Stakeholder Presentation & Timeline creation	0.25	yes	Talia
Stakeholder Presentation agenda	0.25	yes	Talia
Stakeholder Presentation and Recap	1.00	yes	Talia
Technical coordination	0.25	yes	Talia
Questionnaire follow up	0.25	yes	Talia
Questionnaire questions and follow up	0.50	yes	Talia
Project Plan Updates/OneDrive	0.25	yes	Talia
Tech review call rescheduling	0.25	yes	Talia
Solution Design call & recap	1.50	yes	Talia
Technical Review call	0.50	yes	Talia
Solution Design creation	1.25	yes	Talia
Employee Demographic check in w/Incode	0.50	yes	Talia
Updated Impl. Hours & OneDrive	0.25	yes	Talia
Trey - Billed - Bi Weekly Status Call	0.50	yes	Trey
Trey - Billed - Call to discuss compatibility with Incode	0.50	yes	Trey
Install/conversion follow up	0.50	yes	Trey
Obtain integration files - Discussions	0.75	yes	Talia
Technical Review call	0.25	yes	Talia
Notice of Install	0.25	yes	Talia
Integration questions	0.50	yes	Talia
Solution Design revision	2.00	yes	Talia
Updated Impl. Hours & OneDrive	0.25	yes	Talia
Obtain integration files additional work	0.50	yes	Talia
Missed scheduled call	0.50	yes	Talia
AsOne Inquiry	0.50	yes	Talia
Trey - Billed - Oregon City, OR - Integration Prep	1.25	yes	Trey
Trey Oregon City, OR - Weekly Meetings, Tasks & Calls (Week: 10/08 - 10/12)	0.50	yes	Trey
Trey - Billed - Oregon City, OR - Data Integration Acceptance	0.5	yes	Trey
Assistance with integration file issues	0.50	yes	Talia
Project check in & timeline creation	0.75	yes	Talia
Project call coordination with Ryan	0.75	yes	Talia
Checked in with internal team regarding upgrade	0.00	no	Talia
Trey Oregon City, OR - Weekly Meetings, Tasks & Calls (Week: 10/22 - 10/26)	0.25	yes	Trey

Total Duration

18.50

Rhea, Shikendra B.

From: Jarvis, Hillary
Sent: Wednesday, January 12, 2022 4:51 PM
To: Burns, Jamie
Subject: FW: Talia/Trey Client synopsis



From: Harrison, Talia <Talia.Harrison@tylertech.com>
Sent: Wednesday, August 15, 2018 1:19 PM
To: Griffiths, Trey <Trey.Griffiths@tylertech.com>
Cc: Pasch Hillary <Hillary.Pasch@tylertech.com>
Subject: RE: Talia/Trey Client synopsis

Hey Trey,

Below is an updated synopsis for our clients, I am still updating and adding notes. Most of this information is for you to know where the project stands, anything that is an action item for you to follow up with has a due date in red. Let me know if you have any questions, I'm sure I will send this to you at least two more times before the end of the week 😊

Client Synopsis

Muskogee, OK

- There is a JAR attached to NI-25709, Trey please apply it to the clients system **Due 08/13 - Completed**
- We will follow up with Kelly on the weekly call Tues **8/14** and work with her on testing – **Completed**
- Client to transition to support 08/16 @ 3pm cst
- Chris is reaching out to Superior to schedule a call so that I can work with them on mapping the job costing fields to payroll

American Samoa

- Reggie has a ticket to copy the et production database to ET Test database - **Completed**
- Talia has an email into Dev to see if a new JAR is needed as well as testpayroll export folder on the server – **Completed, additional JAR not needed, testexport folder will be needed**
- Talia asked Andrew to sign off on Pilot Testing and Established Go Live from the Admin Checklist as well as Data Integrations Acceptances & Training Acceptance final tasks on **08/10 – PENDING**
- Talia has also asked Andrew to provide dates for export comparison and final pay period to test with, account may go on hold if we cannot solidify a go live - **PENDING**

Baton Rouge

- Talia/Trey – Onsite for user trainings 08/20 thru 08/24
- Trey's working on building security roles for the city – **Due Date 08/17**

Bowling Green

- Talia emailed signature requirements for Integration Approval and Implementation Timeline Approval on **08/06**
- Brian would like to meet to review the above as he doesn't recall what info was to be reviewed call scheduled for **08/13 - Complete**
- Clocks – Erin reached out to them regarding their clocks, not sure if she's received a response so I asked for a follow – **Completed, 1 clock was ordered**
- No VPN needed since this client is self-hosted
- Trey, please reach out to Brian Bushong for the IP to be used on the clock purchased, that way you have what you need on the clock has been received. You'll want to include in that email that they notify you once they have the clock and it is powered on & connected to the network – **Due 08/17**

Calvert, MD

- Waiting on the site report information and external link to be configured – **Completed, however external link currently isn't working. Once we have the files we will move forward by connecting to the server to prep the application for integration**
- Jonathan (Superion) & Lynn have been in contact regarding the extract files - **NI-17437 Talia reached out to Nick w/Superion regarding integration files**
- Talia to map out timeline and Integration Approval

Davis County, UT

- Clocks shipped 07/30/2018 – **Trey to confirm receipt of clocks with client – Due 08/21**
- We have the initial files for integration sent by Tom
- Trey can begin prepping the application once we are able to log into the application, we may be able to complete this from the server via gotomeeting once we're ready – **Lets coordinate connecting to the server to prep the application for integration instead of waiting on the external link – Due 08/17**
- External link not working
- Talia owes them a Solution Design 😊, I sent an email to follow up on some items I'd like to include in the design **08/10**

Emeryville

- Trey to complete recording per Mikes request - **Complete**
- Currently out of implementation hours
- Trey working with Mike to move recordings to Mikes machine

Germantown, TN

- Project call scheduled for 08/13 to relaunch implementation

Harrisonville, MO

- Comp max issue has been resolved. I thought Lindsay was working on the export issue, by the time I got her connected I realized she had the comp issue instead. In the future when scheduling a troubleshooting ticket with support please coordinate a go to meeting the person who has the ticket. You'll want to establish any connections for servers for the support rep to look at the issue.
- Issue with Export has been assigned to Dev for an upgrade, Reggie has the ticket assigned to him – **Complete**
- Trey has tested the export and confirmed the reg hours code is now exporting properly. Trey will coordinate Allison to be on the call with Harrisonville and test the export out of ET and upload to Incode – **Due 08/17/2018 (client is scheduled to go live 08/27 so we need to ensure this is resolved before we head out of town)**

- Hillary is working on Invoice questions from client – **Complete**

Michigan City, IN

- Stakeholder Presentation scheduled for **08/16**
- Talia needs to build documents for presentation
- Installation of ExecuTime is scheduled **Due Date 09/12**

NW MI Council Governments

- Solution Design call scheduled for **08/29/2018**

Nixa

- There's a new JAR out for this client, see NI-18246, Trey please apply to clients system and test generating a file out of ExecuTime in preparation for Export training **Due 08/17**
- Once we are ready for export training, please coordinate having Allison on the line so that you can do your spill and then she can take over and walk the client through loading the file in Incode
- We are still waiting on Amanda to confirm which field in Incode the grants should be sent to, please continue to follow up and push for a response on this item – Trey please keep your finger on the pulse for this information, this should be included in every recap and mentioned during every call until we have what we need **Due 08/22/2018**
- Nixa unable to use external link, Talia to troubleshoot but for now advised Trey to have the client use their production link. If client has issues with the production link that will change the priority of this issue – **Due Date 08/29/2018**

Oak Harbor

- Talia to update the action items list from Patricia **Due Date 08/17/2018 - completed**
- Patricia has indicated that she provided the Fire & Police dept tracking codes to Trey on 08/10 – Trey to build codes in Oak Harbor's application under System Admin>Job Costing>Department Tracking Codes – **Due Date 08/17**
- Trey is looking into the issue with employee status not updating with the nightly job. He may schedule a call with support to trouble and involve Eden if necessary – **Due date 08/29/2018**

Oregon City, OR

- Client is interested in implementing one Incode AsOne is available, Hillary has an email out to Melissa dated 08/09 referencing when this will be available and if she wishes to wait to implement

Osage Beach, MO

- Pending Solution Design approval
- NI-21635 – Emailed Trey for an update on the VPN document and CRM to be completed for configuration of the VPN device.
- Waiting on integration files. I send Brenda and Kim an email asking for an update 08/14

Palm Desert, CA

- Pending payroll export change to convert them to a flat file export, email in to Hillary as to whether this should be billable or not
- Client should be entering time to test the export with but we haven't heard back, Trey to follow up with Clayton

Santa Rosa County, FL

- Integration pending with Trey, once completed and I am notified that the integration review call is scheduled I will plan to request signatures

Signal Hill, CA

- I sent them the first draft of their Solution Design today 08/14/2018
- ExecuTime has been installed on the server
- This client is converting data from Incode9 to Incode10 and as of June 5th Anna Allen indicated they were in the beginning stages. I've reached out to Anna, to see if there are any updates as to where they are with producing files for integration 08/14/2018
- This client is hosted, Trey please send them the VPN document for completion if you haven't done so already. Once you have the completed document you would create a CRM for networking and attach the completed document to the CRM ticket Due **08/21/2018**
- Anna replied, they have employees ready so she's reaching out to the team to train them on how to generate the extract files **08/15/2018**

St. Johns Fire District

- Pending questionnaire & Solution Design call (Sd call scheduled for

Youngsville, LA

- I will be reaching out to the client to see if we can get things moving

Rhea, Shikendra B.

From: Harrison, Talia
Sent: Tuesday, October 30, 2018 3:49 PM
To: Pasch Hillary
Subject: Talia/Trey Implementation Tracker
Attachments: Implementation Tracker.xlsx



Hey Hillary,

I've combined the information Trey provided in his document with additional tasks that should be/will be completed throughout the implementation. My thought is, it would be used as an easy checks/balance between myself & an IC considering the changes coming with how billing will be handled. I believe it would be easy to keep this document opened during the day, applied updates which for the most part would just be a "x" that the task was completed or scheduled along with a date.

I don't want to over complicate the process but more so than anything I learned during my time having an IC and trying to transition him into completing task while I monitor and assist is difficult when I'm not always sure where the project stands, notes/emails are in the tickets etc.

I started the tasks with integration prep since that is where the IC picks up the project, if this document is something we could all use, and be something that would be sent on a weekly basis I think it would be great to add the stakeholder presentation, solution design call/creation/approval etc so that the IC knows what's coming down the pipeline.

Any who, I just wanted to share. I am still finalizing where each of my clients are but wanted to go ahead and send over what I have thus far.

Regards,
Talia

Talia Harrison
Sr. Project Manager Lead
Tyler Technologies, Inc.

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Rhea, Shikendra B.

From: Harrison, Talia
Sent: Tuesday, October 8, 2019 1:24 PM
To: Burns, Jamie
Subject: RE: Meeting to discuss my team

Follow Up Flag: Follow up
Flag Status: Completed



Hey,

Okay we can still meet if you want but I did just have a heart to heart with Brian and brought to his attention some of the feedback we've been getting. I was also able to provide some positive feedback as well (Starkville). I basically just let him know that he may need to inquiry a little more when clients are asking for functionality he's not sure about. I told him to use the fact that we are constantly rolling out new features as a reason to "look into their request further". That way he buys himself some time to check with me/other ICs.

I know Brian is trying and so I wanted to be fair and just keep it real with him so that he has an opportunity to work on these things.

We discussed his semi-monthly tickets, billable days & submitting NBCTQ as well. All in all he took the constructive criticism well. I told him that if there is anything I can do better to help him to let me know, even if that means scheduling more time with him. He assured me he'd work on the stuff I pointed out and will let me know what I can do to help.

T

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From: Burns, Jamie <Jamie.Burns@tylertech.com>
Sent: Tuesday, October 8, 2019 12:24 PM
To: Harrison, Talia <Talia.Harrison@tylertech.com>
Subject: RE: Meeting to discuss my team

Hi there. Ya.... Can you get something scheduled for Friday?

Regards,

Jamie Burns

From: Harrison, Talia <Talia.Harrison@tylertech.com>

Sent: Tuesday, October 8, 2019 11:28 AM

To: Burns, Jamie <Jamie.Burns@tylertech.com>

Subject: Meeting to discuss my team

Hey Jamie,

I know you mentioned us meeting this week to come up with a plan for my team, are you wanting me to schedule that call?

Thanks,

Talia Harrison

Senior Project Manager

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Rhea, Shikendra B.

From: Harrison, Talia
Sent: Wednesday, December 12, 2018 4:57 PM
To: Greene, Suzanne
Subject: Suzi/Talia Impl Meeting recap



Hey Suzi,

Below is a quick recap of action items from our call today, please let me know if I have mistakenly misstated or left anything out.

- Outstanding list of items for clients being managed by Hillary - **Due 12/17**
 - i. Confirmation on Go Lives for clients managed by Hillary – **Due 12/17**
 - ii. My goal is to try and assist you and Hillary with some of these items so that we can move these clients out all our plates 😊
- Scheduled time with me, reserved for working on clients we are co implementing
 - i. Moving Monday morning meetings to 8am so that we can have an hour to prep for the week
 - ii. Moving Wed's call to Fri for 30 minutes this will be to catch up and keep each other updated with items from the week
 - iii. Of course we can schedule time in between when my assistance is needed and have impromptu meetings as well when needed
- Close email, Skype etc when sitting in on trainings with clients & internal presentations, weekly meetings, implementation calls etc if that helps keep you from being distracted. The point here is to just give your full attention to whomever you are on the phone with or listening to and again reduce you going from one thing to the next before finishing out tasks to be completed
- All training/meeting recap emails must be sent no more than 1 day later than when the call took place
 - i. This also applies to gotomeeting invitations for calls, trainings etc. Please send these out as close to when you confirmed the date time as possible so that the client can send the information to attendees and reserve this time on their schedules as well
 - ii. All tickets must be updated with copied emails and communications no later than the week the calls took place. So for example, while your recap is due to be sent

to the client no more than 1 day later than when the call took place. The semi-monthly ticket with this information copied to it must be updated in the same week that call took place.

- Answering calls for clients – While it’s a great thing you answer when clients call and you’re eager to assist them BUT this presents an interruption when you are in the middle of something and can cause conflict with billing hours, completing items for clients in a timely manner etc
 - i. To address this, if & when a client calls me I will always (whether I’m on a call/meeting or not) let the phone ring and send them an email saying I see that are calling or have called. I tell them I am in the middle of a meeting and ask them to let me know via emails what’s going on so I can assist via email or if emergent have someone reach out to them. This usually trains them to email me instead of calling without me having to say “please don’t call me only email”.

I’d like for you to put this with any other goals you have set to streamline how you communicate with clients so that you can effectively manage your schedule as best you can with limited client interruption. This should also increase your ability to get recaps and gtm meeting invites etc out sooner than later and you’ll soon see that the goals you set for yourself are more obtainable. Rule of thumb that I go by, if I know the client isn’t processing a live export, it can wait.

 - ii. With that being said, try to avoid scheduling yourself back to back for calls, you need that time in between to prepare. Especially when preparing for weekly calls, I always need time to go back and read the last recap I sent the client long before I get on the call with them. One, to make sure I have addressed my action items and two to make sure I know what I am expecting them to give me an update on
- Fridays are to be left open for catch up time; however, if you have a client requesting a call or training on Friday use your best judgement

Client related items

NW MI Council of Gov

- i. Duration code can be set up by removing the allow for clock in/out transaction flag on the pay code
- ii. You can turn the clocking abilities off for the entire application within the UI Flags
- iii. You can also remove the start/in time fields from timesheet entry via the UI Flags

Davis County

- i. Departments that are in ET that should not be were manually entered
- ii. You can delete them as long as there are no employees attached

Osage

- i. To troubleshoot missing employees, use the employee import file that should be in onedrive and I will load to kiteworks to make sure all the fields that are required to be in the application are there and match the exact format that is in the file.
(Department name, employee type, pay period etc)

Talia big task!

Get all client documents loaded to KiteWorks so that you don't have to go between Kiteworks and OneDrive to find what you need Due **12/17**

T

Talia Harrison

Sr. Project Manager Lead
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Rhea, Shikendra B.

From: Harrison, Talia
Sent: Thursday, March 7, 2019 3:37 PM
To: Burns, Jamie
Subject: RE: Implementation complaints



Hey there,

Just a quick follow up to my call with Dearborn after our call this afternoon. Her main complaint is just not having thorough responses and follow ups to open items and said that every recap she's ever received from Suzi came a day before their next weekly call so a week after the call.

The good news is, they did verbally confirm go live with 5 departments on 02/17 and paid them with this data on 03/05, they also brought on another 5 on 03/03

The action items she's pending with Suzi, I have Brian working on them now, most of them we were able to know out 😊 I prepped her that we would plan to transition her account to support the week of 03/25 and she's okay with this as well
 T

Talia Harrison

Sr. Project Manager
 Tyler Technologies, Inc.

P: 800.772.2260 ext. 4840

www.tylertech.com



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From: Harrison, Talia
Sent: Thursday, March 7, 2019 10:42 AM
To: Burns, Jamie <Jamie.Burns@tylertech.com>
Subject: Implementation complaints

Hey Jamie,

Below is a recap of what was brought to my attention this week from each of the clients, please let me know if you need anything else

Osage Beach, MO (Go Live – 04/12)

- Cindy emailed me on 03/05 stating she's send Suzi several emails over the past week and hasn't received any responses - email attached

Dearborn, MO (Go-Live 02/17)

- This client should have been processing their first live export 03/05 but I received the email attached. Christine says the last weekly call recap she received from Suzi was on 02/19 & they've had 2 calls since then and no recap was sent. I looked through Suzi's semi-monthly tickets and no notes are listed
- This clients weekly call wasn't on my schedule for yesterday 03/06 so I missed sitting in for this call even though it was in Hillary's recap to me about filling in for Suzi. I was wrapped up with working with Brian and it completely slipped my mind
- Christine and I hae a call today at 2:30 but she's asking if there's any way I can get a recap from Suzi as she has now forgotten the action items she was supposed to be completing

Oregon City, OR (Go Live 04/21)

- During the weekly call with then 03/05, Ryan expressed frustration with Suzi's response time to their questions and issue. He said they send her items throughout the week and will not receive answers until their next weekly

call (scheduled on Tues). He said even then they seem to be getting the runaround. Melissa, the PM on this implementation had already looped me in on emails and said this had gotten much better of the last four weeks but before then she was beyond frustrated

Germantown, TN (Missed two go lives and refuses to sign off on a new date pending several unresolved issues)

- I met with this client this morning and Stephanie expressed frustrations with Reggie & Suzi. I've already escalated the issues related to Reggie to Greg and received a response. For Suzi, Stephanie said she feels like she's dragging them along. I took from this call Suzi isn't organized and doesn't seem to be providing them with what they need to keep the project moving

T

Talia Harrison

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Tyler Technologies, Inc.

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Rhea, Shikendra B.

From: Harrison, Talia
Sent: Tuesday, January 14, 2020 11:47 AM
To: Burns, Jamie
Subject: RE: Brian Ledbetter
Attachments: Brian Ledbetter Performance Eval notes.docx



Follow Up Flag: Follow up
Flag Status: Completed

See attached

Talia Harrison
 Implementation Analyst
 Tyler Technologies, Inc.

P: 800.772.2260 ext. 4840

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From: Burns, Jamie <Jamie.Burns@tylertech.com>
Sent: Saturday, January 11, 2020 12:53 PM
To: Harrison, Talia <Talia.Harrison@tylertech.com>
Cc: Burns, Jamie <Jamie.Burns@tylertech.com>
Subject: Brian Ledbetter

Hi there,

I hope you are doing well. I wanted to see if you would mind sharing your thoughts regarding Brian in the following category. Thanks so much!

<p>JOB KNOWLEDGE Refers to the knowledge, skills and experience required to perform the job.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>DECISION MAKING</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>

<p>Selects proper course of action among several alternatives.</p> <p>Weight: 1.00</p>	<p>edit</p>	
<p>DEVELOPMENT</p> <p>The extent to which someone seeks and achieves continuous improvement and growth.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>DEPENDABILITY</p> <p>Can be relied on to get the job done.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>WORK QUANTITY & QUALITY</p> <p>Refers to the amount of work produced and its accuracy, timeliness and thoroughness.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>TEAMWORK</p> <p>The ability to work as an effective team member.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>CLIENT FOCUS</p> <p>Ensures the product or service meets the client's expectations.</p> <p>Weight: 1.00</p>	<p><i>No manager comments have been added for this competency.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>COMMUNICATION</p> <p>Transfers information from one person to another.</p>	<p><i>No manager comments have been added for this competency.</i></p>	

Weight: 1.00

Rating:

edit

Jamie Burns

Manager of Professional Services
Tyler Technologies, Inc.

P: 800.772.2260 ext. 4836

www.tylertech.com



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JOB KNOWLEDGE

Refers to the knowledge, skills and experience required to perform the job.

Weight: 1.00

Brian has been able to quickly learn the basic implementation life cycle and had been working to improve in the area of identifying individual site needs / learning styles per client, to adjust and implement accordingly. A goal I would have liked to see Brian set for 2020 would be to make more time for testing new functionality he's learned from working with others & review of release notes/training content shared.

Rating:

edit

The employee does not have this competency in a self-evaluation.

DECISION MAKING

Selects proper course of action among several alternatives.

Weight: 1.00

There were often instances where no action took place on Brian's behave. When I would ask Brian about the status of an action item from a weekly call or confirmation a tasks had been completed in an effort to update the Implementation Timeline, his reply would be "I'll do it now" ; "I didn't know how you'd want me to move forward because..." or "I was going to ask you because I wasn't sure". In several instances delays with decision-making required I become heavily involved in the day to day functions of an IC in order to save go live. I would say most of this just came from Brian still learning what decisions he could make without me, learning what tasks in the timeline he could be working on while waiting on me to officially hand the project over to him, learning how to he could be proactive. A goal I would set for Brian would be pay more attention to the Implementation Timelines, strive to review all assigned TLs at least once a week, working one client at a time. Take on task in the

The employee does not have this competency in a self-evaluation.

	<p><i>timeline that you know you could be working on while the PM's working to solidify the timeline, provide integration connectivity details etc. This should also increase Brian's billable goal. Work towards staying ahead of the projects</i></p> <p>Rating:</p> <p>edit</p>	
<p>DEVELOPMENT</p> <p>The extent to which someone seeks and achieves continuous improvement and growth.</p> <p>Weight: 1.00</p>	<p><i>Brian displayed growth in the area of learning the IC role and expectations. The more projects he took, I was able to tell he'd gotten the hang of the order in which certain tasks should take place. In the area of learning the application, I think Brian would take the responses/ steps I gave him and send it to the client without going into the application to review and gain the knowledge for future use. I include this comment because there were often times, I'd have to repeat troubleshooting steps, remind him of an email previously sent containing the response to the inquiry or process change. There were times we were sent information to be reviewed by Hillary in an effort to stay current/in the know, when I followed up with Brian to see if he had a chance to read/review the information that was shared he had not. Keeping up with Semi-Monthly tickets, including troubleshooting steps when creating cases for support was something, I'd often have to remind Brian of. Examples documentation review: AsOne Integration documentation, Workflow Management, internal process changes and Confluence as a reference tool for understanding standard</i></p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>

	<p><i>import/export functionality, export links etc.</i></p> <p>Rating:</p> <p>edit</p>	
<p>DEPENDABILITY Can be relied on to get the job done.</p> <p>Weight: 1.00</p>	<p><i>Brian is dependable; however, comments previously stated affected how well he was able to complete certain tasks assigned.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>WORK QUANTITY & QUALITY Refers to the amount of work produced and its accuracy, timeliness and thoroughness.</p> <p>Weight: 1.00</p>	<p><i>Based on comments shared with myself, Hillary & Jamie from clients via email, transition to support surveys and escalations I would say some improvement as far as accuracy is needed by Brian. Comments were shared by clients about the quality of work delivered, some said they felt they knew more about the application than Brian did. Others shared when they asked Brian how to set something up, they were often told "you can really set it up however you'd like" not really giving them any direction/examples of what the application could do for them. I've also had several clients express frustration with Brian as far as asking him a specific question and receiving a response that the application couldn't handle their request. Then when the client came to me directly, they found what they'd asked Brian for was available.</i></p> <p><i>Brian shared with me multiple times the number of projects he was responsible for in addition to</i></p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>

	<p><i>traveling as much as he had was overwhelming.</i></p> <p><i>I would just recommend anything Brian has a "I don't think so" or "No" response to, he takes that down as an action item instead of providing that response right then in there. Research the inquiry and then follow up with the client to help retain credibility with clients. Use weekly calls to understand the challenges clients are running into and provide feedback in writing so that you can reference the response later for future implementations until you feel confident in your responses.</i></p> <p>Rating:</p> <p>edit</p>	
<p>TEAMWORK The ability to work as an effective team member.</p> <p>Weight: 1.00</p>	<p><i>Brian is a team player and had begun leaning on his team (other ICs) more about application knowledge & assistance.</i></p> <p>Rating:</p> <p>edit</p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>
<p>CLIENT FOCUS Ensures the product or service meets the client's expectations.</p> <p>Weight: 1.00</p>	<p><i>I received several comments from clients stating they felt Brian wasn't helping them understand how the application needed to be configured to meet their needs but instead were told "it's really however you want to set it up". Examples: Santa Rosa, FL; Calvert County, MD; Bowling Green, OH; Homewood, AL</i></p> <p><i>A goal I would recommend for Brian would be to study the application more and become familiar with the various ways certain configuration can be done so that clients can be given options they can choose from. One thing I tried to stress to Brian is that for</i></p>	<p><i>The employee does not have this competency in a self-evaluation.</i></p>

	<p><i>the most part all our clients ask for the same stuff, they just word it differently. Take notes of the different questions you receive, take time to review those questions and play around in the application. Use those notes as a punch list to refer back to for future implementations.</i></p> <p>Rating:</p> <p>edit</p>	
<p>COMMUNICATION Transfers information from one person to another.</p> <p>Weight: 1.00</p>	<p><i>Brian struggled with this, I was often going to him to requesting updates, following up on previous tasks I asked him to complete, status of timeline tasks and reminding him of deadlines. In cases where an update was given by Brian, I often had to ask for more details as the information provided would be vague and not enough for me to make a decision or provide suggestions/feedback. Clients often came to me asking for updates regarding action items Brian was working on for them. From an IC/Client standpoint, I feel Brian also struggles with controlling the project and keeping clients on task, providing timely feedback so that due dates aren't missed. We had a couple clients where Brian felt things going south based on how the client interacted with him, but this information wasn't brought to me until it was too late. This led to me having to take over many projects, travel onsite with a client and perform damage control.</i></p> <p><i>Goal setting, Brian should work on picking up on client frustrations sooner, be candid with clients to identify where they are feeling apprehensive so that he can manage frustration and/or work with his PM to defuse as many</i></p>	

*situations on his own and/or with
the help of his PM.*

Rating:

edit

JOB KNOWLEDGE

Refers to the knowledge, skills and experience required to perform the job.

Weight: 1.00

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Rating:

edit

The employee does not have this competency in a self-evaluation.

DECISION MAKING

Selects proper course of action among several alternatives.

Weight: 1.00

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*situations on his own and/or with
the help of his PM.*

Rating:

edit

Rhea, Shikendra B.

From: Harrison, Talia
Sent: Thursday, October 3, 2019 3:36 PM
To: Burns, Jamie
Subject: FW: HR Certification



Follow Up Flag: Follow up
Flag Status: Completed

Brian was onsite with Santa Rosa when Bob came to me for assistance with this request. This was after the HR Director asked Brian while he was onsite if this could be done and Brian told them no instead of inquiring with me and telling them he would follow up.

Talia Harrison
Senior Project Manager
Tyler Technologies, Inc.

P: 800.772.2260 ext. 4840

www.tylertech.com



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From: Harrison, Talia
Sent: Thursday, September 12, 2019 7:20 AM
To: Robert Miller <millerr1@flcjr.net>
Cc: Ledbetter, Brian <brian.ledbetter@tylertech.com>
Subject: RE: HR Certification

Hi Bob,

Yes there is a way to have a message that automatically appears when timecards are approved. To create your custom message you'll need to be logged into ExecuTime as an administrator. Navigate to System Admin > UI Environment Flags > UI > Ctrl + F: Message to show for Timesheet Approvals. In this area you can free text your message, below I've included an insert from the Integration help document that provides additional details.

Provides a custom message to display on Time Approvals at both the Employee and Supervisor level. It also displays on the Timecard Report, Job Costing Timecard Report, and Hours Approval Report. Use the HTML tag to span custom CSS styles on this message. This allows you to create custom text formatting using fonts, colors, and other CSS text effects.

Please let me know if I can assist with anything else.

Regards,

Talia Harrison
Senior Project Manager
Tyler Technologies, Inc.

P: 800.772.2260 ext. 4840

www.tylertech.com



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From: Robert Miller <millerr1@flcjin.net>
Sent: Wednesday, September 11, 2019 3:30 PM
To: Harrison, Talia <Talia.Harrison@tylertech.com>
Subject: HR Certification

Talia,

In our training session this afternoon, our HR director asked whether it might be possible to add a statement to the approval screen indicating that by approving the timesheet the employee is certifying that the time entered is true and correct. I told her I would check to see if that would be possible. Do you know if there is any way we could add that statement to our system?

The language that is included on the timesheet system that our Clerk employees currently use is "By submitting this timesheet you are stating that it is a true representation of your time. Falsification of any attendance or leave record shall be cause for the dismissal of the employee or employees involved."

Thank you,

Bob Miller, CPA, CPFO, CGFO
Assistant Director of Finance and Administration
Santa Rosa County Clerk of Courts
6495 Caroline Street, Suite B
Milton, FL 32570
Phone: (850)-983-1963
Fax: (850)-983-1985

EXHIBIT

19

1/19/22

Harrison

Rptr: LO

Internal Application Policy

Tyler Technologies is dedicated to helping employees reach their professional goals through growth within a position as well as through internal promotions and transfer opportunities. Although a manager may assist an employee's career development, the employee has the ultimate responsibility for their career at Tyler.

ELIGIBILITY

An internal candidate must meet the following criteria:

- Candidate is a current, regular, full- or part-time employee in good standing.
- Candidate has been assigned to their current position for at least 18 months.

JOB POSTING

Non-confidential job openings for each location are published on Tyler's website. The company may choose not to post a position, if there is an employee within the team or department who is qualified to fill the position, or the opening is a senior-level or management position.

APPLICATION SUBMISSION PROCEDURE

1. Employee completes the internal job application form and electronically attaches an updated resume.
2. Current manager electronically signs the application, and the employee electronically submits it to Human Resources. *Check to see if you are required to have the signature of your department executive/vice president, as well; some departments require this.*
3. Human Resources forwards the internal job application to the hiring manager, once HR confirms that the candidate meets the eligibility requirements.

Interview: Once the hiring manager has identified the internal and external candidate pool, interviews will be scheduled. Based on the response to the position, all internal applicants may not be interviewed.

Selection: The internal or external candidate who, in the judgment of the hiring manager, is the best fit for the position will be selected. If all skills and abilities are considered equal, current Tyler employees will be given preference.

Offer: The position will be offered to the employee once the hiring manager and current manager have agreed on an effective date and a transition plan.

RESPONSIBILITIES

Current Manager

The current manager is responsible for providing performance feedback to the hiring manager on request.

Hiring Manager

Hiring managers are discouraged from soliciting potential internal candidates for their open position. When an employee accepts a transfer and/or promotion, the hiring manager will work with the current manager to establish an effective date and a transition plan that is mutually beneficial to the business needs of both organizations. It is the hiring manager's responsibility to communicate the final decision to the internal candidates who were not selected.

Human Resources

Human Resources will ensure the process is smooth and timely as well as provide internal candidates regular and timely communication regarding the status of their application. If you have any questions throughout the application process, please reach out to the HR contact recruiting for this position.

Internal Job Application

TO BE COMPLETED BY EMPLOYEE:

Employee Name Talia Harrison	Today's Date 10/02/2019
Posted Position Implementation Analyst	Current Position Sr. Project Manager - ExecuTime
Hire Date 09/09/2013	Time in Current Position 6 yrs

Please answer the following questions:

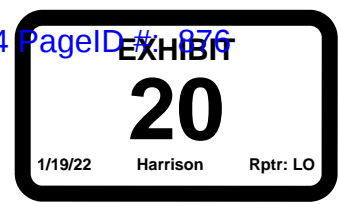
<p>Describe how your current role has prepared you for this position and how it aligns with your career goals.</p> <p>I've had the opportunity to implement ExecuTime over the past six years & during this time I've gained ample experience working with multiple Tyler payroll systems as well as those outside of the Tyler realm. I've been able to successful implement client ranging from as little as 50 users to 3500 or more. While I love working as a project manager my personal goal has been to obtain a position that allows to me help other PMs and potentially ICs with less experience achieve some of same milestones. Over the years I've been able to consistently provide other PMs with tips for keeping projects moving by assisting with conflict resolution.</p> <p>Is there anything else you would like us to know about your qualifications for this role?</p> <p>None that I can think of at this time</p>

TO BE COMPLETED BY CURRENT MANAGER:

Manager Name Jamie Burns	Date 10/3/2019
Signature JBurns	Department Executive Signature (if required)
Comments	

HR USE ONLY:

<input type="checkbox"/> 18 months	<input type="checkbox"/> No Cap	<input type="checkbox"/> Iview Scheduled	<input type="checkbox"/> Other HR Team Notified
Position Awarded:	<input type="checkbox"/> Yes	<input type="checkbox"/> No	If no, why not?



The Implementation Analyst position has a direct impact on Tyler's revenue because of the responsibility and accountability for keeping Tyler's client-facing, revenue-generating resources performing at optimal levels of quality and expertise with minimal disruptions due to technical/product issues. The Implementation Analyst demonstrates a highly experienced and in-depth knowledge of Tyler software as well as complex technical issues. The Implementation Analyst ensures the training and support they provide facilitates the resolution of issues and does not interrupt the schedule or budget of implementation projects. Incumbents contribute and provide leadership to assigned implementation field staff.

Responsibilities

- Provide guidance and direction to assigned implementation field staff to ensure they perform at optimal levels of quality and expertise with minimal disruptions due to technical/product issues.
- Provide leadership in the creation of 'best practice' templates, process improvements and knowledge transfer materials to improve efficiencies and customer satisfaction levels.
- Work closely with implementation field staff, Project Managers, and sometimes clients to troubleshoot and resolve critical issues and ensure billable training days are not interrupted.
- Provide non-billable informational sessions by webinar to Implementation Consultants or their clients.
- Identify and document highly complex business/technical specifications for client configuration/build requirements and/or other relevant issues.
- May provide support to the sales team as follows:
 - Respond to module- or system-specific questions in proposal documents.
 - Resolve client follow-up questions during the proposal process.
- Assist with demonstrations and attend demonstrations to expand knowledge of Tyler products. In some instances may conduct demonstrations to perspective clients.
- May assist the implementation field staff with conversion loading if a client does not have an IT staff or an OSDBA contract.
- Provide follow-up assistance to clients on highly complex applications or processes, as necessary.
- Travel to client sites may be required, as needed.
- Perform other duties as assigned

Qualifications

- Bachelor's degree, or comparable work experience.
- Typically a minimum of four years of experience implementing Tyler software (or equivalent experience).
- Excellent initiative, interpersonal, collaboration and relationship building and customer service experience involving developing professional, trusting and in-depth relationships with internal and external clients (including software development/IT teams, Project Managers, management, clients, etc.).

- Advanced knowledge and experience identifying, defining, analyzing and documenting client work processes, data and systems.
- Proven success record of negotiating and influencing clients to meet their need by proposing viable solutions to complex issues.
- Excellent attention to detail involving defining client complex software requirements (technical and non-technical), client processes, etc.
- Excellent organizational skills with a proven track record of prioritizing and executing on multiple priorities successfully.
- Excellent research, analytical and critical thinking skills and experience in the technical environment involving performing proficient data/gap analysis with outstanding problem solving experience anticipating and resolving root issues of new and the most complex problems.